

TLS5 SMARTBOOK



**TLS5: The Leader's
SMARTbook, 5th Ed.**

**Military Leadership
(ADP/ADRP 6-22)**

**Leader Development
(FM 6-22)**

**Counsel, Coach,
Mentor (ATP 6-22.1)**

**Team Building
(ATP 6-22.6)**

**Military Training
(ADP/ADRP/FM 7-0)**

**Train to Win in a
Complex World**

**Unit Training Plans,
Mtgs, Schedules, Briefs**

**Conducting Training
Events & Exercises**

**Training Assessments
& After Action Reviews**

LEADERSHIP & TRAINING

in a Complex World

The Lightning Press



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LEADERSHIP & TRAINING in a Complex World

The Lightning Press
Norman M Wade



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(TLS5) The Leader's SMARTbook, 5th Ed.

Military Leadership & Training in a Complex World

This is the fifth edition of The Leader's SMARTbook, incorporating the full scope of new material from FM 7-0, FM 6-22 and ATP 6-22.6. Topics and chapters include military leadership (ADP/ADRP 6-22); leader development (FM 6-22); coach, counsel, and mentor (ATP 6-22.1), team building; (ATP 6-22.6), military training (ADP/ADRP 7-0), train to win in a complex world (FM 7-0); unit training plans, meetings, schedules, briefs; conducting training events and exercises; training assessments, evaluations and after action reviews.

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(TLS5) Notes to Reader

Among professions, the **Army Profession** has unique characteristics because of the lethality of our operations. The Nation tasks the Army to do many things besides combat operations, but ultimately the primary reason the Army exists is to fight and win the Nation's wars through prompt and sustained land combat, as part of the joint force. The Army must always be prepared to accomplish this mission through the application of **lethal force**.

Leadership is the process of influencing people by providing purpose, direction, and motivation to accomplish the mission and improve the organization. As an **element of combat power**, leadership unifies the other elements of combat power (information, mission command, movement and maneuver, intelligence, fires, sustainment and protection). Confident, competent, and informed leadership intensifies the effectiveness of the other elements of combat power.

The Army depends upon itself to develop adaptable leaders able to achieve mission accomplishment in dynamic, unstable, and complex environments. A robust, holistic **leader development** program is essential. Through a mix of education, training, and experience, Army leader development processes produce and sustain agile, adaptive, and innovative leaders who act with boldness and initiative in dynamic, complex situations to execute missions according to doctrine, orders, and training.

Leaders have three principal ways of developing others. They can provide knowledge and feedback through **counseling, coaching, and mentoring**. The military is a team of teams composed of numerous organizations with one overarching common mission: win the nation's wars. The ability to **build teams** through mutual trust and maintain effective, cohesive teams throughout military operations is an essential skill for all commanders, staffs, and leaders.

The Army trains to win in a complex world. To fight and win in a chaotic, ambiguous, and complex environment, the Army trains to provide forces ready to conduct unified land operations. The Army does this by conducting tough, realistic, and challenging training. Training is the most important thing the Army does to prepare for operations. **Training is the cornerstone of readiness.** Readiness determines our Nation's ability to fight and win in a complex global environment.

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Prologue: Win in a Complex World (The U.S. Army Operating Concept)

Ref: TRADOC Pamphlet 525-3-1, *The U.S. Army Operating Concept: Win in a Complex World 2020-2040* (Oct '14), fig. 1, p. vi.

The Army Operating Concept (AOC) describes how future Army forces will prevent conflict, shape security environments, and win wars while operating as part of our Joint Force and working with multiple partners. The AOC guides future force development by identifying first order capabilities that the Army needs to support U.S. policy objectives. It provides the intellectual foundation and framework for learning and for applying what we learn to future force development under Force 2025 and Beyond.

Continuity and Change in Armed Conflict

Anticipating the demands of future armed conflict requires an understanding of continuities in the nature of war as well as an appreciation for changes in the character of armed conflict. Technological advances and changes in strategic guidance, joint operating concepts, and security challenges require the U.S. Army to innovate to ensure that forces are prepared to accomplish future missions. Shifts in the geopolitical landscape caused by competition for power and resources influence the character of armed conflict. These shifts, and violence associated with them, occur more rapidly than in the past due to advances in technology, the proliferation of information, and the associated increased momentum of human interaction.

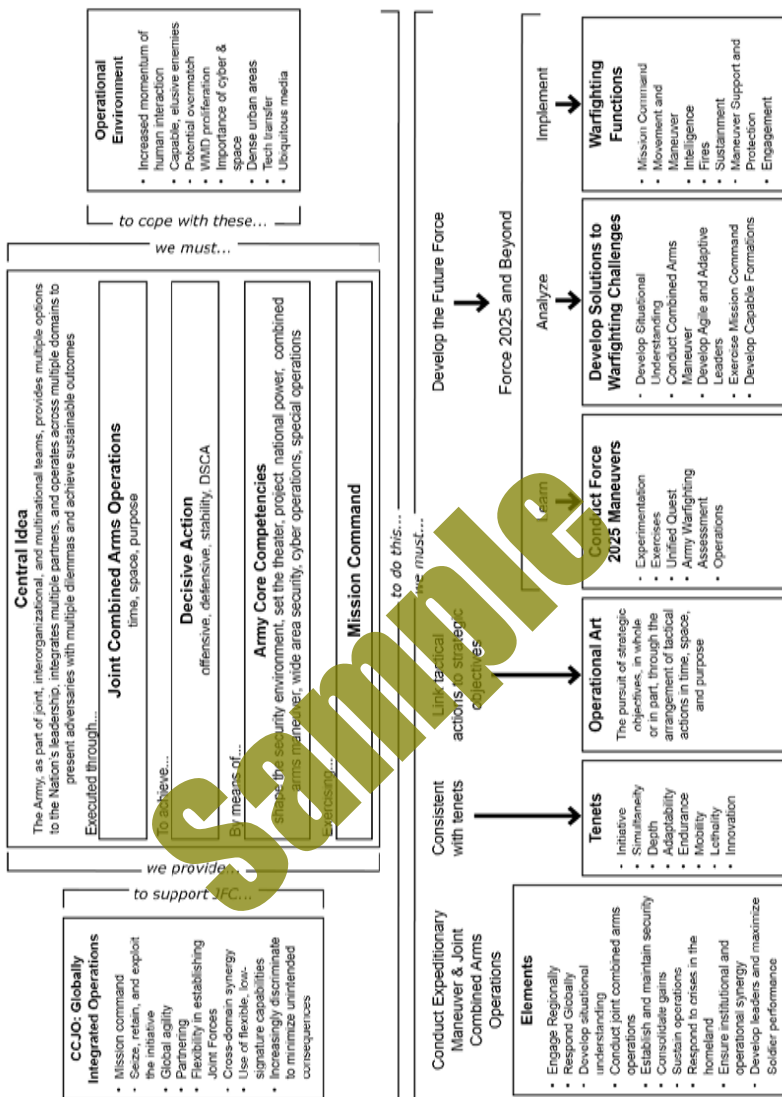
Recent and ongoing conflicts reinforce the need to balance the technological focus of Army modernization with a recognition of the limits of technology and an emphasis on the human, cultural, and political continuities of armed conflict. Nations and organizations in the future will fight for the same reasons that the Greek historian Thucydides identified 2,500 years ago: fear, honor, and interest. Every armed conflict exhibits some combination of violence, emotion, policy, chance, and risk. Fundamentally, war will remain a contest of wills. Although advances in technology will continue to influence the character of warfare, the effect of technologies on land are often not as great as in other domains due to geography, the interaction with adaptive enemies, the presence of noncombatants, and other complexities associated with war's continuities.

Threats to U.S. vital interests across the land, air, maritime, space, and cyberspace domains originate on land. Land-based threats emanate from the fielded forces of hostile nation states and from areas where state weakness allows nonstate enemy or adversary organizations to operate. Conflict often arises from disorder (the breakdown of peaceful and lawful behavior). In conflicts involving nation states, disorder often follows the defeat of enemy forces or the collapse of a regime. Land forces are required to overcome the effects of this disorder through military operations that integrate joint, interorganizational, and multinational capabilities. Although the ability to project power onto land from the air, maritime, space, and cyberspace domains will remain vital to joint operations, the employment of land forces will remain essential to achieve political outcomes.

Army Forces in Joint Operations

American military power is joint power. The Army both depends on and supports air and naval forces across the land, air, maritime, space, and cyberspace domains. The Army depends on the other services for strategic and operational mobility, fires, close air support, and other capabilities. The Army supports other services, combatant commands, multinational forces, and interorganizational partners with foundational capabilities such as communications, intelligence, rotary wing aviation, missile defense, logistics, and engineering. Army forces are uniquely suited to shape security environments through forward presence and sustained engagements with allied and partner land forces. Army forces defeat enemy land forces and seize, hold, and defend land areas. The Army also prepares for security operations abroad including initial establishment of military government pending transfer of this responsibility to other authorities.

Win in a Complex World



Refer to AODS5: *The Army Operations & Doctrine SMARTbook* for complete discussion of the fundamentals, principles and tenets of army operations and organization (ADP/ADRP 3-0 Operations, 2016); chapters on each of the six warfighting functions: mission command (ADP/ADRP 6-0), movement and maneuver (ADPs 3-90, 3-07, 3-28, 3-05), intelligence (ADP/ADRP 2-0), fires (ADP/ADRP 3-09), sustainment (ADP/ADRP 4-0), and protection (ADP/ADRP 3-37); *Doctrine 2015* guide and glossary of terms.



(TLS5) References

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Army Doctrinal Publications (ADPs) and Army Doctrinal Reference Publications (ADRP)

ADP 1	Sept 2012	The Army (INCL C1 AND C2)
ADRP 1	Jun 2013	The Army Profession
ADP/ADRP 3-0	Nov 2016	Operations
ADP/ADRP 5-0	May 2012	The Operations Process
ADP/ADRP 6-0	May 2012	Mission Command (INCL C1)
ADP/ADRP 6-22	Aug 2012	Army Leadership (INCL C1)
ADP/ADRP 7-0	Aug 2012	Training Units and Developing Leaders

Army Techniques Publications (ATPs)

ATP 6-22.1	Jul 2014	The Counseling Process
ATP 6-22.6	Oct 2015	Army Team Building

Field Manuals (FMs)

FM 6-0	Apr 2016	Commander and Staff Organization and Operations (INCL C2)
FM 6-22	Jun 2015	Leader Development
FM 7-0	Oct 2016	Train to Win in a Complex World

Other Publications

UTM Guide	Aug 2012	Unit Training Management (Guide), Combined Arms Center - Training
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Chap 8

Assessing Training

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Army Leadership

Ref: ADP 6-22, *Army Leadership* (Aug '12).

The Army exists to serve the American people, protect enduring national interests, and fulfill the nation's military responsibilities. Fulfilling these purposes relies on leaders who embody values based leadership, impeccable character, and professional competence. Leaders require these enduring qualities regardless of the mission or assignment, at all levels, across all cohorts.

I. Army Leader Defined

Leadership, the lifeblood of an army, makes a difference every day in the United States Army. Since the formation of the Continental Army until today with Soldiers deployed around the globe, Army leaders have accepted the challenges before them. The United States Army has always had great leaders who have risen above hardships and have drawn on a range of leadership qualities to influence Soldiers, build units, and accomplish the mission.

Leadership is characterized by a complex mix of organizational, situational, and mission demands on a leader who applies personal qualities, abilities, and experiences to exert influence on the organization, its people, the situation, and the unfolding mission. Difficult and complex situations are the proving ground for leaders expected to make consistent timely, effective and just decisions.

An Army leader is anyone who by virtue of assumed role or assigned responsibility inspires and influences people to accomplish organizational goals. Army leaders motivate people both inside and outside the chain of command to pursue actions, focus thinking and shape decisions for the greater good of the organization.

See p. 1-9 for discussion of leadership as an element of combat power.

II. Purpose of Leadership

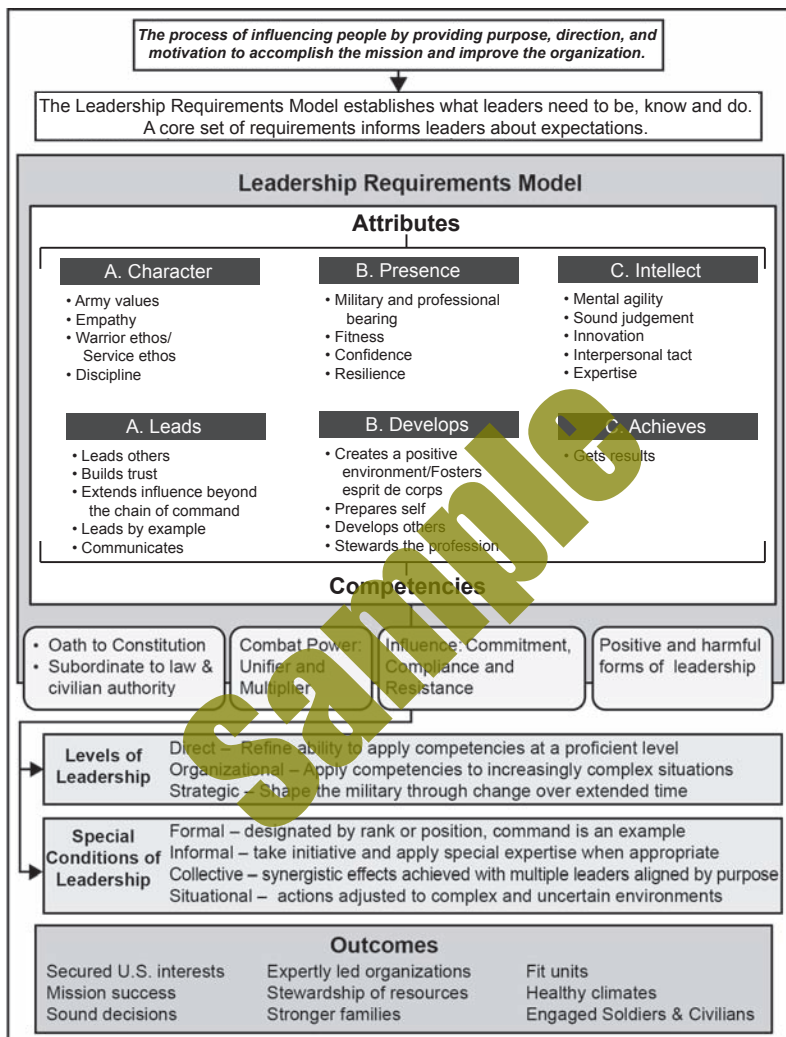
The Army requires leadership to make choices and establish unifying direction for the organization. Organizations have multiple sources to monitor and assess situations and provide input for decisions; however, a central leader must oversee and ultimately accept responsibility for the conduct of missions. Leadership is the process of influencing people by providing purpose, direction, and motivation to accomplish the mission and improve the organization.

Leadership is a process of influence. Since first publishing leadership doctrine in 1948, the Army has consistently defined leadership as a process. This is significant because a process can be learned, monitored and improved. While personality and innate traits affect a process, the Army endorses the idea that good leadership does not just happen by chance but is a developable skill. A leader influences other people to accomplish a mission or fulfill a purpose. The means of influence include actions to convey motivation. Accomplishing the current mission is not enough—the leader is responsible for developing individuals and improving the organization for the near and long-term.

As an **element of combat power**, leadership unifies the other elements (information, mission command, movement and maneuver, intelligence, fires, sustainment, and protection). Leadership is a multiplier of effects; with it, organizations are focused and synchronized, resources are used efficiently, people become energized and motivated, and missions are more likely to achieve desired outcomes. Leadership serves a motivational purpose: to energize others to achieve challenging goals.

See p. 1-9 for discussion of leadership as an element of combat power.

Army Leadership (Underlying Logic)



Ref: ADP 6-22, Army Leadership (Aug '12), fig. 1, p. iii.

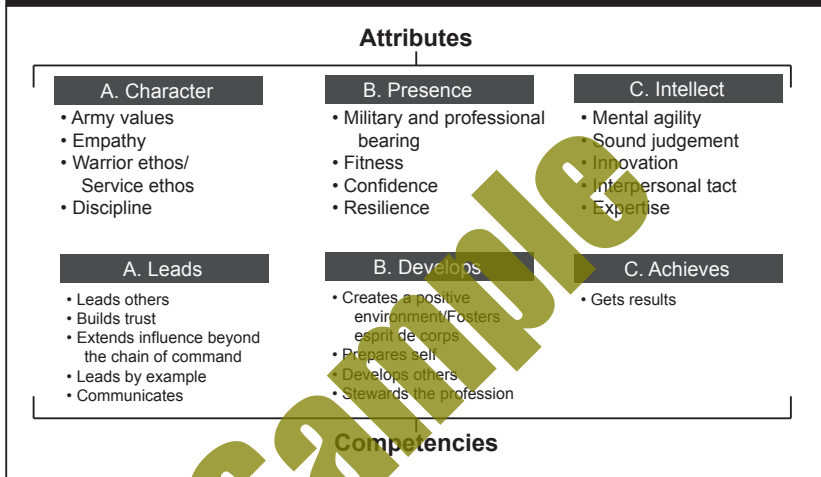
A **self-aware leader** will learn from each decision and action; with guidance from superiors, the leader will grow in confidence. Resilient and fit leaders have the psychological and physical capacity to bounce back from life's stressors to thrive in an era of high operational tempo and persistent conflict.

V. Leadership Requirements Model

Ref: ADP 6-22, *Army Leadership* (Aug '12), pp. 5 to 6.

The Leadership Requirements Model conveys the expectations that the Army wants leaders to meet. A common model of leadership shows how different types of leaders work together and is useful for aligning leader development activities and personnel management practices and systems. One set of requirements consists of attributes of what leaders should **be** and **know** and the second is a set of competencies that the Army requires leaders to **do**. The single model organizes the disparate requirements and expectations of leaders at all levels of leadership.

Army Leadership Requirements Model



Ref: ADP 6-22, *Army Leadership* (Aug '12), fig. 2, p. 5.

Leadership Attributes

Leadership attributes are characteristics internal to a leader. Character is the essence of who a person is, what a person believes, how a person acts. The internalization of Army Values is one type of character attribute. Empathy is identifying and understanding what others think, feel and believe. Leaders of character who embrace the Army leader attributes and competencies will be authentic, positive leaders. While character relates to the internal identity of the leader, presence attributes relate how others see the leader and intellect relates to what abilities and knowledge the leader possesses to think and interact with others.

See pp. 1-17 to 1-32 for further discussion.

Leadership Competencies

Leadership competencies are groups of related actions that the Army expects leaders to do—lead, develop and achieve. Core competencies are those groups of actions universal to leaders, across cohorts and throughout organizations.

See pp. 1-33 to 1-76 for further discussion.

II. Leader Attributes

Ref: ADRP 6-22, Army Leadership (Aug '12), Part Two.

The Army Leader -

A Person of Character, Presence, and Intellect

Army leadership doctrine addresses all aspects of leadership, the most important being the Army leader. Part Two examines that person and highlights critical attributes all Army leaders can use to reach their full professional potential from direct leader to strategic leader. When Soldiers and Army Civilians begin as leaders, they bring certain values and attributes, such as family-ingrained values, and the aptitude for certain sports or intellectual abilities, such as learning foreign languages. Education, training and experience aim at using these existing qualities and potential to develop well-rounded leaders. Development of the desired attributes associated with character, presence and intellect requires acknowledgement through consistent self-awareness and lifelong learning.

Leader Attributes

The Army Leader - A Person of Character, Presence, and Intellect:

Attributes

A. Character

- Army values
- Empathy
- Warrior ethos/Service ethos
- Discipline

B. Presence

- Military and professional bearing
- Fitness
- Confidence
- Resilience

C. Intellect

- Mental agility
- Sound judgement
- Innovation
- Interpersonal tact
- Expertise

Ref: ADRP 6-22 Army Leadership (Aug '12), Part Two.

Leader Attributes

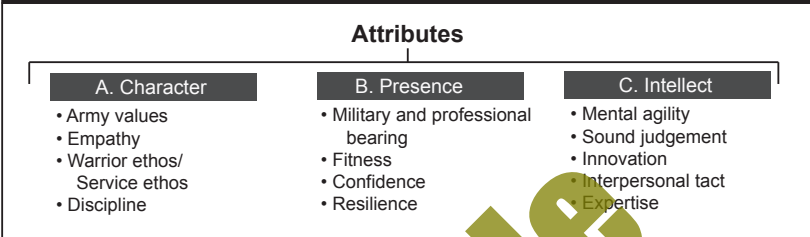
Attributes shape how an individual behaves and learns in their environment. The leader attributes are character, presence and intellect. These attributes capture the values and identity of the leader (character); the leader's outward appearance, demeanor, actions and words (presence); and the mental and social faculties the leader applies in the act of leading (intellect). Attributes affect the actions that leaders perform. Good character, solid presence and keen intellect enable the core leader competencies to be performed with greater effect.

Leader Attributes

Ref: ADP 6-22, Army Leadership (Aug '12), pp. 6 to 7.

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Leader Attributes



I. Character

Leadership is affected by a person's character and identity. Integrity is a key mark of a leader's character. It means doing what is right, legally and morally. The considerations required in leader choices are seldom obvious as wholly ethical or unethical. The Soldier's Rules, which codify the law of war, outline ethical and lawful conduct in operations and are useful for everyday conduct (see AR 350-1). Leaders who unwaveringly adhere to applicable laws, regulations, and unit standards build credibility with their subordinates and enhance trust from the American people they serve. Leaders of integrity adhere to the values that are part of their personal identity and set a standard for their followers to emulate. Identity is one's self-concept, how one defines him or herself. Leaders who are effective with followers identify with the role and expectations of a leader; they willingly take responsibilities typical of a leader and perform the actions of a leader. Leaders who are unsure of themselves may not have a strong idea of their identity.

Factors internal and central to a leader that constitute an individual's core.	
Army Values	<ul style="list-style-type: none">• Values are principles, standards, or qualities considered essential for successful leaders.• Values are fundamental to help people discern right from wrong in any situation.• The Army has seven values to develop in all Army individuals: loyalty, duty, respect, selfless service, honor, integrity, and personal courage.
Empathy	<ul style="list-style-type: none">• The propensity to experience something from another person's point of view.• The ability to identify with and enter into another person's feelings and emotions.• The desire to care for and take care of Soldiers and others.
Warrior Ethos/ Service Ethos	<ul style="list-style-type: none">• The internal shared attitudes and beliefs that embody the spirit of the Army profession for Soldiers and Army Civilians alike.
Discipline	<ul style="list-style-type: none">• Control of one's own behavior according to Army Values; mindset to obey and enforce good orderly practices in administrative, organizational, training, and operational duties.

Ref: ADRP 6-22, Leadership, table 3-1, p 3-5.

D. Resilience

Resilient leaders can recover quickly from setbacks, shock, injuries, adversity, and stress while maintaining their mission and organizational focus and they foster this capacity in followers. Resilient leaders learn and grow from those situations, incorporating changes into positive outcomes for mission accomplishment. Resilience helps leaders and their organizations to carry difficult missions to conclusion.

Resilience and the will to succeed help leaders during adversity. Competence and knowledge guide the energies of a strong will to pursue courses of action that lead to success. Leaders instill resilience and a winning spirit in subordinates through leading by example and with tough and realistic training.

Resilience is essential when pursuing mission accomplishment. Regardless of the working conditions, a strong personal attitude helps prevail over adverse external conditions. All Army members will experience situations when it would seem easier to accept defeat rather than finish the task. During those times, everyone needs an inner source of energy to press on to mission completion. When things go badly, a leader must draw on inner reserves to persevere.

III. Leader Intellect

An Army leader's intellect draws on the mental tendencies and resources that shape conceptual abilities applied to one's duties and responsibilities. Conceptual abilities enable effective problem solving and sound judgment before implementing concepts and plans. They help one think creatively and reason analytically, critically, ethically, and with cultural sensitivity to consider unintended as well as intended consequences. Leaders must anticipate the second- and third-order effects of their actions.

Leader Intellect

The conceptual components affecting an Army leader's intellect include:



Mental Agility



Sound Judgement



Innovation



Interpersonal Tact



Expertise

Ref: ADRP 6-22 Army Leadership (Aug '12), chap. 5.

Leader Competencies (Overview)

Ref: ADP 6-22, *Army Leadership* (Aug '12), pp. 7 to 8.

There are three categories of competencies. The Army leader serves to **lead** others; to **develop** the environment, themselves, others and the profession as a whole; and to **achieve** organizational goals.

A. Leads (see pp. 1-35 to 1-52)

The category of leads encompasses five competencies. Two focus on the affiliation of the followers and the common practices for interacting with them. Leads others involves influencing Soldiers and Army Civilians in the leader's organization. Extends influence beyond the chain of command involves influencing others when the leader does not have designated authority or while the leader's authority is not recognized by others, such as with unified action partners. Builds trust is an important competency to establish conditions of effective influence and for creating a positive environment. Leader actions and words comprise the competencies of leads by example and communicates. Actions can speak louder than words and excellent leaders use this to serve as a role model to set the standard. Leaders communicate to convey clear understanding of what needs to be done and why.

Leaders are expected to extend influence beyond the chain of command, which usually has limited formal authority. This competency widens the responsibility and sphere of influence for a leader. Such influence requires insightful—and possibly nonstandard—methods to influence others. Its limited authority stems from the audience's possible lack of the traditions, customs, and regulations of the Army and military forces. When extending influence, Army leaders have to assess who they need to influence and determine how best to establish their authority and execute leadership functions. Extending influence is a competency that includes negotiation, consensus building and conflict resolution.

B. Develops (see pp. 1-53 to 1-70)

Leaders operate to improve or sustain high performance in their organization. They do so by focusing on the four develops competencies. Create a positive environment inspires an organization's climate and culture. Prepares self encourages improvement in leading and other areas of leader

responsibility. Leaders develop others to assume greater responsibility or achieve higher expertise. A leader stewards the profession to maintain professional standards and effective capabilities for the future.

Leaders are responsible for development. They must ensure that they themselves are developing, that they are developing subordinates, and that they are sustaining a positive climate and improving the organization. Leaders encourage development and set conditions while performing missions. Development occurs by having subordinates reflect on what happened during an event, by assessing whether units performed at or well above standard and why, in addition to having a positive mindset of improvement and learning. Every experience is developmental.

Leaders have choices to make about developing others. Leaders choose when and how to coach, counsel and mentor others. Leaders often have the freedom to place people in the best situation to maximize their talent. Then the leader provides resources the subordinate needs to succeed, makes expectations clear, and provides positive, meaningful feedback. As part of their developmental responsibilities, leaders must prepare themselves and act to promote long-term stewardship of the Army.

C. Achieves (see pp. 1-71 to 1-76)

Gets results is the single achieves competency and relates to actions to accomplish tasks and missions on time and to standard. Getting results is the goal of leadership but leaders must remain mindful that leading people and creating positive conditions enable them to operate as successful leaders. Getting results requires the right level of delegation, empowerment and trust balanced against the mission. Adaptability to conditions and adjustments based on adversarial actions are ever important elements of success.

Competencies Applied for Success

Ref: ADRP 6-22, Army Leadership (Aug '12), table 8-1, p. 8-4.

Army leaders pursue excellence whenever possible. They ensure that all members know the important roles they play every day. Competent leaders understand that excellence in leadership does not mean perfection. On the contrary, competent leaders allow subordinates room to learn from their mistakes as well as their successes. In an open and positive work climate, people excel to improve and accept risks to learn. It is the best way to improve the force and develop confident leaders. Competent and confident leaders tolerate honest mistakes that do not result from negligence. It involves trying, learning, trying again, and getting better each time.

Army leaders pursue excellence whenever possible. They ensure that all members know the important roles they play every day. They look for everyday examples occurring under ordinary circumstances: how a Soldier digs a fighting position, prepares for guard duty, fixes a radio, or lays an artillery battery; or how an Army Civilian improves maintenance procedures, processes critical combat supplies, and supports the families of deploying service members. Army leaders know each of these people contributes to the mission.

Competent leaders understand that excellence in leadership does not mean perfection. On the contrary, competent leaders allow subordinates room to learn from their mistakes as well as their successes. In an open and positive work climate, people excel to improve and accept risks to learn. It is the best way to improve the force and develop confident leaders. Competent and confident leaders tolerate honest mistakes that do not result from negligence. It involves trying, learning, trying again, and getting better each time. However, the best efforts and intentions do not negate an individual's responsibility for their own actions.

A leader's ultimate purpose is to accomplish organizational results. A leader gets results by providing guidance and managing resources, as well as performing the other leader competencies. Gets results focuses on consistent and ethical task accomplishment through supervising, managing, monitoring, and controlling the work. A leader:

Prioritizes, organizes and coordinates taskings for teams or other organizations structures/groups

- Ensures the course of action achieves the desired outcome through planning
- Organizes groups and teams to accomplish work
- Ensures all tasks can be executed in the time available and that tasks depending on other tasks are executed in the correct sequence
- Limits over-specification and micromanagement

Identifies and accounts for capabilities and commitment to task

- Considers duty positions, capabilities, and developmental needs when assigning tasks
- Conducts initial assessments to assume a new task or a new position

Designates, clarifies, and deconflicts roles

- Establishes and employs procedures for monitoring, coordinating, and regulating subordinate's actions and activities
- Mediates peer conflicts and disagreements

Identifies, contends for, allocates and manages resources

- Tracks people and equipment
- Allocates adequate time for task completion
- Allocates time to prepare and conduct rehearsals
- Continually seeks improvement in operating efficiency, resource conservation, and fiscal responsibility
- Attracts, recognizes, and retains talent

Removes work barriers

- Protects organization from unnecessary taskings and distractions
- Recognizes and resolves scheduling conflicts
- Overcomes obstacles preventing accomplishment of the mission

Recognizes and rewards good performance

- Recognizes individual and team accomplishments; rewards appropriately
- Credits subordinates for good performance; builds on successes
- Explores reward systems and individual reward motivations

Seeks, recognizes and takes advantage of opportunities to improve performance

- Asks incisive questions
- Anticipates needs for actions; envisions ways to improve
- Acts to improve the organization's collective performance
- Recommends best methods to accomplish tasks; uses information and technology to improve individual and group effectiveness
- Encourages staff to use creativity to solve problems

Makes feedback part of work processes

- Gives and seeks accurate and timely feedback
- Uses feedback to modify duties, tasks, procedures, requirements, and goals
- Uses assessment techniques and evaluation tools (such as AARs) to identify lessons learned and facilitate consistent improvement
- Determines the appropriate setting and timing for feedback

Executes plans to accomplish the mission

- Schedules activities to meet commitments in critical performance areas
- Notifies peers and subordinates in advance of required support
- Keeps track of task assignments and suspenses; attends to details
- Adjusts assignments, if necessary

Identifies and adjusts to external influences on the mission and organization

- Gathers and analyzes relevant information about changing conditions
- Determines causes, effects, and contributing factors of problems
- Considers contingencies and their consequences
- Makes necessary, on-the-spot adjustments

III. Types of Stress

Ref: ADRP 6-22, Army Leadership (Aug '12), pp. 9-3 to 9-4.

Stress is a major part of the leadership environment. Major sources of stress include an ever changing geopolitical situation, combat and operational stress and related fears, the rapid pace of change, and the increasing complexity of technology. A leader's character and professional competence are important factors in mitigating stress for the organization and achieving mission accomplishment, despite environmental pressures and changes. When dealing with these factors, adaptability is essential to success.

Combat and Operational Stress

Stress in response to threatening or uncertain situations occurs in all types of military operations as well as during training exercises, in garrison, and issues related to family and home life. Military experiences expose Soldiers to various combat and operational stresses throughout their careers. Combat and operational stress control does not take away the experiences faced while engaged in such operations, but provides mechanisms to mitigate reactions to those experiences so that Soldiers remain combat effective and maintain the quality of life to which they are entitled.

Leaders must understand stress and anticipate Soldiers' reactions. It takes mental discipline and resilience to overcome obstacles, Soldiers becoming wounded or dying, and the enemy attacking unexpectedly. When preparing for sustained operations, leaders must thoroughly condition their Soldiers to address combat and operational stress.

When possible, Soldiers should have access to combat and operational stress control team/behavioral health personnel, medical personnel and chaplains to continue their physical and psychological recovery to ensure successful reintegration. Experts treating the psychologically wounded must work hand-in-hand with the unit chain of command to stress the importance of maintaining good order and discipline. Leaders must not tolerate aggressive or criminal behavior as compensation for negative operational experiences.

Overcoming Fear in Battle

Leaders need to understand that danger and fear will always be a part of their job. Battling fear means recognizing fear and effectively dealing with it. Understanding the situation and acting with foresight and purpose overcomes fear. Army leaders must expect fear to take hold when setbacks occur, the unit fails to complete a mission, or there are casualties. Fear can paralyze a Soldier. Fear of the unknown can be terrifying. Soldiers who see their friends killed or wounded become aware of their own mortality.

Good preparation, planning, and rigorous training carry Soldiers through the challenges of operating under hazardous conditions. Realistic training developed around critical tasks and battle drills is a primary source for the resilience and confidence to succeed along with the ability to gut it out when things get tough. Leader competence, confidence, agility, courage, and resilience help units persevere and find workable solutions to tough problems.

Stress in Training and Operations

Training to high standards, using scenarios that closely resemble the stresses and effects of the actual battlefield, is essential to success and survival in combat. A meaningful and productive mission with detailed constraints and limitations and high standards of performance induces a basic level of stress. Leaders must add unanticipated conditions to training to create a demanding learning environment.

Stress of Change

To succeed in an environment of continuous change, leaders emphasize the constants of the Army Values, teamwork, and discipline while helping their subordinates anticipate change, adapt to change, and seek new ways to improve. Competent leadership implies managing change, adapting, and making change work for the team.

Leader Development

Ref: FM 6-22, Leader Development (Jun '15), chap 1 and 2.

The Army depends upon itself to develop adaptable leaders able to achieve mission accomplishment in dynamic, unstable, and complex environments. A robust, holistic leader development program is essential. Through a mix of education, training, and experience, Army leader development processes produce and sustain agile, adaptive, and innovative leaders who act with boldness and initiative in dynamic, complex situations to execute missions according to doctrine, orders, and training. Furthermore, it also produces leaders that possess the integrity and willingness to act in the absence of orders, when existing orders, doctrine or their own experience no longer fit the situation, or when unforeseen opportunities or threats arise.



Ref: FM 6-22 (Jun '15), Introductory Figure 1. Integrating diagram.

The goal of leader development programs is to develop Army leaders who clearly provide purpose, direction, motivation, and vision to their teams and subordinates while executing missions to support their commander's intent. Leaders at all levels need to be prepared to understand the strategic context for execution and success of any mission.

Leader development is fundamental to our Army—leader development is the deliberate, continuous, sequential, and progressive process—founded in Army values—that grows Soldiers and Army Civilians into competent and confident leaders capable of decisive action. Leader development is achieved through the life-long synthesis of the knowledge, skills, and experiences gained through the training and education opportunities in the institutional, operational, and self-development domains (AR 350-1). A key component of leader development is remaining focused on the professionalism of our leaders and those they lead. By developing and promoting a professional force, the Army develops trust on several levels: between Soldiers; between Soldiers and leaders; between Soldiers and Army Civilians; between the Soldiers, their families and the Army; and between the Army and the American people. This is why the Army is committed to providing quality institutions of education and training along with challenging experiences throughout a career.

I. Tenets of Army Leader Development

The tenets of Army leader development provide the essential principles that have made the Army successful at developing its leaders. The tenets also provide a backdrop for the Army principles of unit training. The overarching tenets of Army leader development are—

- Strong commitment by the Army, superiors, and individuals to leader development.
- Clear purpose for what, when, and how to develop leadership.
- Supportive relationships and culture of learning.
- Three mutually supportive domains (institutional, operational, and self-development) that enable education, training, and experience.
- Providing, accepting, and acting upon candid assessment and feedback.

Development of people is an Army priority. Commitment represents intention and engagement from the individual, from supportive leaders, and from the Army. Beyond their directed responsibility to develop subordinates, leaders want to serve in an organization that values camaraderie and teamwork and improves the capabilities of others. Leaders have a directed responsibility to develop their subordinates; accountability for implementation follows responsibility. Leaders must be committed to the development of others and themselves. Teams change and organizations change when individuals choose to engage and improve.

Development depends on having clear purpose for what, when and how to develop. Good leader development is purposeful and goal-oriented. A clearly established purpose enables leaders to guide, assess, and accomplish development. The principles of leader development describe goals for what leaders need to be developed to do: leading by example, developing subordinates, creating a positive environment for learning, exercising the art and science of mission command, adaptive performance, critical and creative thinking, and knowing subordinates and their families. The core leader competencies and attributes identified in ADRP 6-22 and the Army Leader Development Strategy (ALDS) provide additional detail of what leaders need to be able to do.

Supportive relationships and a culture of learning recognize that for development to occur a willingness to engage with others must exist. This tenet relates to two of the principles of leader development: creating a learning environment and knowing subordinates and their families (see ADRP 7-0). Leaders, organizations, and the entire Army must set the conditions for development to occur. Leader development is a mindset incorporated into all organizational requirements and mission accomplishment. Leaders must balance leader development against organizational requirements and mission performance. In operational units and other organizations, development can occur concurrently with training and mission performance, especially when leaders create an environment that places real value and accountability on leader development activities and the Soldiers and civilians to be developed.

2-2 Leader Development

Planning Leader Development Programs

Ref: FM 6-22, *Leader Development* (Jun '15), pp. 2-4 to 2-5.

To start a plan, the leadership team goes through a conceptual process to consider how to achieve its desired end state. The end state and enduring purpose help guide the detailed phase of planning that involves the selection of activities to emphasize in the unit's program.

Leaders with a mindset, clear-cut vision, and a passion for developing others, themselves, and teams are the most important elements of a successful leader development program. They capitalize on every opportunity. The activities cover both unit and individual development for short-term and long-term development. The following factors provide ways to structure a plan:

- Phases of a leader's cycle within a unit.
 - Reception.
 - Integration.
 - Utilization.
 - Assignment rotation within the unit.
 - Transition.
- Unit cycles.
 - Sustainable readiness model.
 - Deployment schedule.
 - Green-amber-red time management and training cycles.
- Cohort programs.
 - Sergeant's time.
 - Preparation for Soldier and sergeant excellence boards.
 - NCO professional development.
 - Warrant officer professional development.
 - Officer professional development.
 - Command team.
 - Civilian leader development seminars.
 - Combined leader development programs.
- Developmental focus—common core for the team and all leaders.
 - Essential characteristics of the profession (see ADRP 1).
 - Command climate (see AR 600-20).
 - Mission command principles (see ADRP 6-0).
 - Core leadership competencies (see ADRP 6-22).
 - Core leader attributes (see ADRP 6-22).
 - Performance qualities, such as adaptability, resilience, versatility, creativity.
 - Core unit mission and functions.
- Developmental focus—career paths for groups of leaders.
 - Career leadership responsibilities (see DA PAM 600-3, DA PAM 600-25, Army Civilian Training, Education, and Development System (ACTEDS)).
 - Career Management Field.
 - Functional area.
 - Army Civilian Career Programs.

Gathering Feedback

Ref: FM 6-22, *Leader Development* (Jun '15), pp. 4-2 to 4-3.

After considering these questions, analyze the answers to determine the opinions that each person considered may have of your strengths and developmental needs:

Supervisors, raters, and superiors.

- Who gets the most challenging assignments?
- The supervisor relies upon whom during emergencies or tough problems?
- The supervisor praises whom the most?
- What kinds of tasks does your supervisor give you versus others?
- How does your supervisor react to your suggestions compared to others' suggestions?
- Does your supervisor listen to your opinions on certain subjects much more or much less than the opinions of others? If so, what are those subjects?

Peers and Subordinates.

- Do peers and subordinates come to you for help or advice? In what topics?
- Do they understand you or seem confused or overwhelmed by what you say?
- Do they repeatedly contact you for help or are they one-time interactions?
- Does their interest and enthusiasm increase or diminish when they interact with you?
- What does their body language communicate? Is it relaxed, apprehensive, or reserved?

Asking for Feedback

To gain perspective, talk to others who know you in different ways, such as one's rater, enlisted or officer counter-part, mentor, instructor, or family member. The goal is to find out—

- What a person actually saw and their impressions of your action(s).
- That person's impression of how well you performed during the interaction(s).
- How you react in certain situations. For example, "When a subordinate challenges your authority in front of others, you seem to get flustered."

Who to Ask

These are items to consider when determining who to ask for feedback—

- Who has been able to observe you enough to offer useful information?
- Who has observed you from different perspectives?
- Who has experience in an area of interest (former or current supervisor, mentor)?

Things to Remember When Asking for Feedback

When asking for feedback, keep the following in mind—

- Be respectful of others' time—prepare questions ahead of time.
- Approach with an open mind to accept uncomfortable or critical feedback without offense.
- Listen carefully and respectfully.
- Ask for clarification and examples when points are unclear.
- Summarize the points to make sure that you understand the person correctly.
- Thank the feedback providers for their time and assistance.

These ideas may help you focus on what to ask:

- Get descriptions of your behaviors and opinions of those behaviors.
- For feedback about a recurring issue, ask about the situation, your actions, and the usual outcomes.
- Ask for suggestions for other ways of handling situations.

I. Counseling, Coaching, Mentoring

Ref: ADRP 6-22, *Army Leadership* (Aug '12), pp. 7-10 to 7-12 and ATP 6-22.1, *The Counseling Process* (Jul '14).

Leaders have three principal ways of developing others. They can provide knowledge and feedback through counseling, coaching, and mentoring.

Counseling-Coaching-Mentoring

*Leaders have three principal ways of **developing others**. They can provide others with knowledge and feedback through counseling, coaching, and mentoring:*



Counseling



Coaching



Mentoring

Ref: ADRP 6-22, *Army Leadership* (Aug '12), pp. 7-10 to 7-12.

See pp. 1-63 to 1-67 for related discussion of the leader competency “develops others.”

Providing feedback is common to interacting with others during development. Feedback significantly contributes to development, accelerates learning in day-to-day experiences, and translates into better leader performance. Providing feedback starts with observation and accurate assessment of performance. Planning to make observations of a subordinate is the first step in feedback. The best observations occur when subordinates engage in critical performance, interact with their subordinates or other Soldiers, or address a challenging problem. Keeping observation notes is useful when tracking multiple subordinates.

See following page (p. 3-3) for a counseling, coaching and mentoring comparison.

I. Counseling

Counseling is central to leader development. Leaders who serve as designated raters have to prepare their subordinates to be better Soldiers or Army Civilians. Good counseling focuses on the subordinate's performance and issues with an eye toward tomorrow's plans and solutions. Leaders expect subordinates to be active participants seeking constructive feedback. Counseling cannot be an occasional event but should be part of a comprehensive program to develop subordinates. With effective counseling, no evaluation report—positive or negative—should be a surprise. A consistent counseling program includes all subordinates, not just the people thought to have the most potential.

Counseling is the process used by leaders to guide subordinates to improve performance and develop their potential. Subordinates are active participants in the counseling process. Counseling uses a standard format to help mentally organize and isolate relevant issues before, during, and after the counseling session. During counseling, leaders help subordinates to identify strengths and weaknesses and create plans of action. To make the plans work, leaders actively support their subordinates throughout the implementation and assessment processes. Subordinates invest themselves in the process by being forthright in their willingness to improve and being candid in their assessment and goal setting.

Approaches to Counseling

Inexperienced leaders are sometimes uncomfortable when confronting a subordinate who is not performing to standard. Counseling is not about leader comfort; it is about correcting the performance or developing the character of a subordinate. To be effective counselors, Army leaders must demonstrate certain qualities: respect for subordinates, self-awareness, cultural awareness, empathy, and credibility.

One challenging aspect of counseling is selecting the proper approach for a specific situation. To counsel effectively, the technique used must fit the situation. Some cases may only require giving information or listening. A subordinate's improvement may call for just a brief word of praise. Other situations may require structured counseling followed by specific plans for actions. An effective leader approaches each subordinate as an individual. Counseling includes nondirective, directive, and combined approaches. The major difference between the approaches is the degree to which the subordinate participates and interacts during a counseling session.

See also p. 3-14 for related discussion (adaptive approaches to counseling).

Nondirective Approach

The nondirective approach is preferred for most counseling sessions. Leaders use their experiences, insight and judgment to assist subordinates in developing solutions. Leaders partially structure this type of counseling by telling the subordinate about the counseling process and explaining expectations.

Directive Approach

The directive approach works best to correct simple problems, make on-the-spot corrections, and correct aspects of duty performance. When using the directive style, the leader does most of the talking and tells the subordinate what to do and when to do it. In contrast to the nondirective approach, the leader directs a course of action for the subordinate.

Combined Approach

In the combined approach, the leader uses techniques from both the directive and nondirective approaches, adjusting them to articulate what is best for the subordinate. The combined approach emphasizes the subordinate's planning and decision-making responsibilities.

II. Developmental Counseling

Ref: ATP 6-22.1, *The Counseling Process* (Jul '14), chaps. 1 and 2.

Counseling is the process used by leaders to review with a subordinate the subordinate's demonstrated performance and potential. Counseling, one of the most important leadership development responsibilities, enables Army leaders to help Soldiers and Army Civilians become more capable, resilient, satisfied, and better prepared for new responsibilities. Counseling is one process within the developing others competency and benefits from techniques of other competencies: getting results, communicating, and creating a positive environment. Counseling is required of raters and occurs at prescribed times while the related developmental processes of coaching and mentoring may be done voluntarily by others. The Army's future and the legacy of today's Army leaders rest on the shoulders of those they help prepare for greater responsibility.

Counsel,
Coach, Mentor

Types of Counseling



Event Counseling



Performance Counseling



Performance Growth Counseling

Leaders at all levels must understand the counseling process. More importantly, Army leaders must understand that effective counseling helps achieve desired goals and effects, manages expectations, and improves the organization. Regular counseling provides leaders with opportunities to:

- Demonstrate genuine interest in subordinates
- Help subordinates understand their role in accomplishing the unit's mission
- Acknowledge and reinforce exceptional work or dedication
- Evaluate subordinates' potential for development
- Provide subordinates with assistance or resources to address issues or further strengths
- Empower subordinates to identify and solve issues on their own so they become more self-reliant
- Identify issues before they become significant problems
- Identify causes of sub-standard performance

I. Types of Developmental Counseling

Developmental counseling is categorized by the purpose of the session. Understanding the purpose and types of counseling enables the leader to adapt the counseling session to the individual subordinate's needs in order to achieve desired outcomes and manage expectations. Counseling is not a one-size-fits-all endeavor.

While these categories can help organize and focus counseling sessions, they should not be viewed as separate or exhaustive. For example, a counseling session that focuses on resolving an issue may also address improving duty performance. A session focused on performance often includes a discussion on opportunities for professional growth. Regardless of the purpose or topic of the counseling session, leaders should follow a basic format for preparation and execution. The Developmental Counseling Form, DA Form 4856, provides a useful framework to prepare for counseling. It helps organize the relevant issues to cover during counseling sessions.

Types of Counseling



Event Counseling



Performance Counseling



Performance Growth Counseling

A. Event Counseling

See following pages (pp. 3-10 to 3-11) for discussion on event counseling.

Event-oriented counseling involves a specific event or situation. It may precede events such as participating in promotion boards, attending training courses, and preparing for deployment or redeployment. It also addresses events such as noteworthy duty performance, an issue with performance or mission accomplishment, or a personal issue. Examples of event-oriented counseling include:

- Specific instances of superior or substandard performance
- Reception and integration counseling
- Crisis counseling
- Referral counseling
- Promotion counseling
- Separation counseling

B. Performance Counseling

Performance counseling is the review of a subordinate's duty performance during a specified period. The leader and the subordinate jointly establish performance objectives and clear standards for the next counseling period. The counseling focuses on the subordinate's strengths, areas to improve, and potential. Effective counseling includes providing specific examples of strengths and areas needing improvement and providing guidance on how subordinates can improve their performance. Performance counseling is required under the officer, noncommissioned officer, and Army Civilian evaluation reporting systems.

Active Listening

Ref: ATP 6-22.1, *The Counseling Process* (Jul '14), pp. 2-1 to 2-3.

Active listening helps communicate reception of the subordinate's message verbally and nonverbally. To capture the message fully, leaders listen to what is said and observe the subordinate's manners. Key elements of active listening include:

Eye contact

Maintaining eye contact without staring helps show sincere interest. Occasional breaks of eye contact are normal and acceptable, while excessive breaks, paper shuffling, and clock-watching may be perceived as a lack of interest or concern.

Body Posture

Being relaxed and comfortable will help put the subordinate at ease. However, a too-relaxed position or slouching may be interpreted as a lack of interest.

Head Nods

Occasionally head nodding indicates paying attention and encourages the subordinate to continue.

Facial Expressions

Keep facial expressions natural and relaxed to signal a sincere interest.

Check for Understanding

Paraphrase or summarize points back to the subordinate for confirmation; for example, "What I heard was...".

Verbal Expressions

Refrain from talking too much and avoid interrupting. Let the subordinate do the talking, while keeping the discussion on the counseling subject. Active listening implies listening thoughtfully and deliberately to capture the nuances of the subordinate's language. Stay alert for common themes. A subordinate's opening and closing statements as well as recurring references may indicate his priorities. Inconsistencies and gaps may indicate an avoidance of the real issue. Certain inconsistencies may suggest additional questions by the counselor.

Pay attention to the subordinate's gestures to understand the complete message. By watching the subordinate's actions, leaders identify the emotions behind the words. Not all actions are proof of a subordinate's feelings but they should be considered. Nonverbal indicators of a subordinate's attitude include—

- **Self-confidence.** Standing tall, leaning back with hands behind the head, and maintaining steady eye contact
- **Interest, friendliness, and openness.** Be aware that leader actions must be context and situation specific. For example, leaning towards the subordinate may be considered as expressing interest or being aggressive.
- **Anxiety.** Sitting on the edge of the chair with arms uncrossed and hands open
- **Boredom.** Drumming on the table, doodling, clicking a ballpoint pen, or resting the head in the palm of the hand
- **Defensiveness.** Pushing deeply into a chair, glaring at the leader, and making sarcastic comments as well as crossing or folding arms in front of the chest
- **Frustration.** Rubbing eyes, pulling on an ear, taking short breaths, wringing the hands, or frequently changing total body position

Leaders consider each indicator carefully. Although each may reveal something about the subordinate, do not judge too quickly. When unsure look for reinforcing indicators or check with the subordinate to understand the behavior, determine what is underlying it, and allow the subordinate to take responsibility.

Adaptive Approaches to Counseling

Ref: ATP 6-22.1, *The Counseling Process* (Jul '14), pp. 2-4 to 2-5 and table 2-1, p. 2-4.

Leaders plan each counseling session, tailoring the counseling session to the individual and situation. Part of the planning process includes identifying the counseling approach, assessing the individual's situation and reputation, and identifying any likely resistance. An effective leader approaches each subordinate as an individual. Different people and different situations require different counseling approaches. Three approaches to counseling include nondirective, directive, and combined.

IV. Counseling Techniques

The Army leader can select from several techniques when counseling subordinates. These techniques may cause subordinates to change behavior and improve upon their performance.

	Advantages	Disadvantages
Nondirective	<ul style="list-style-type: none">■ Encourages maturity■ Encourages open communication■ Develops personal responsibility	<ul style="list-style-type: none">■ More time-consuming■ Requires greatest counselor skills
Combined	<ul style="list-style-type: none">■ Moderately quick■ Encourages maturity■ Encourages open communication■ Allows counselors to use their experience	<ul style="list-style-type: none">■ May take too much time for some situations
Directive	<ul style="list-style-type: none">■ Quickest method■ Good for those needing clear, concise direction■ Allows counselors to use their experience	<ul style="list-style-type: none">■ Does not encourage subordinate to be part of solution■ Treats symptoms, not issues■ Tends to discourage subordinates from talking freely■ Solution is the counselor's, not the subordinates

Nondirective and Combined Approaches

- **Suggesting Alternatives.** Discuss alternative actions that the subordinate may take. Leader and subordinate together decide which course of action is most appropriate.
- **Recommending.** Recommend one course of action, but leave the decision to accept it to the subordinate.
- **Persuading.** Persuade the subordinate that a given course of action is best, but leave the final decision to the subordinate. Successful persuasion depends on the leader's credibility, the subordinate's willingness to listen, and mutual trust.
- **Advising.** Advise the subordinate that a given course of action is best. This is the strongest form of influence not involving a command.

Directive Approach to Counseling

- **Corrective Training.** Teach and assist the subordinate in attaining and maintaining the required standard. A subordinate completes corrective training once consistently meeting standards.
- **Commanding.** Order the subordinate to take a given course of action in clear, precise words. The subordinate will face consequences for failing to execute.

Example Counseling Session

Ref: ATP 6-22.1, *The Counseling Process* (Jul '14), fig. 2-2, p. 2-9.

1. Open the Session

- To establish a relaxed environment for open exchange, explain that discussing and understanding the importance of the Army Values, leader attributes and competencies makes it easier to develop and incorporate them for success into an individual leadership style.
- State the purpose of the initial counseling: what SFC Taylor must do to be a successful platoon sergeant. Agree on the duty description and specific performance requirements. Discuss related values, competencies, and standards for success. Explain subsequent counseling will address developmental needs and how well performance objectives are met. Urge SFC Taylor to identify developmental needs during the next quarter.
- Ensure that SFC Taylor knows the rating chain. Resolve any questions about the duty position and associated responsibilities. Discuss the close relationship that must exist between a platoon leader and a platoon sergeant including the importance of honest, two-way communication.

2. Discuss the Issue

- Jointly review the draft NCOER duty description including all associated responsibilities such as maintenance, training, and Soldier welfare. Relate the responsibilities to leader competencies, attributes, and values. Revise the duty description, if needed. Highlight areas of special emphasis and additional duties.
- Discuss the meaning of value and responsibility on the NCOER. Discuss the values, attributes, and competencies noted in ADRP 6-22. Ask focused questions to check understanding of these items as part of the platoon sergeant role.
- Explain that character, presence, and intellect are the basis for competent leadership; developing the desired leader attributes requires that Army leaders adopt them through self-awareness and lifelong learning. Emphasize that the plan of action to accomplish major performance objectives must include the appropriate values, attributes, and competencies.

3. Assist in Developing a Plan of Action (During the Counseling Session)

- Ask SFC Taylor to identify tasks to facilitate accomplishing the performance objectives. Describe each by using the values, responsibilities, and competencies found on the NCOER and in ADRP 6-22. Discuss specific examples of success and excellence in each area. Ask for suggestions to make the goals objective, specific, and measurable.
- Ensure that SFC Taylor has at least one example of a success or excellence statement for each area. Discuss SFC Taylor's promotion goals and ask what he considers as strengths and weaknesses. Obtain the last two master sergeant selection board results and compare stated goals and objectives.

4. Close the Session

- Verify SFC Taylor understands the duty description, performance objectives, and expectation to assist in your development as a platoon leader.
- Stress the importance of teamwork and two-way communication.
- Remind SFC Taylor to perform a self-assessment during the next quarter.
- Set a tentative date during the next quarter for the follow-up counseling.

Army Team Building

Ref: ATP 6-22.6, *Army Team Building* (Oct '15), chap. 1.

A team is any group that functions together to accomplish a mission or perform a collective task. A team's work is interdependent and team members share responsibility and accountability for attaining results. There is no size limit to a team. Teams are complex, dynamic groups that range from two people to thousands of individuals. In the Army profession, Soldiers and Department of the Army Civilians are a part of different teams, and sometimes they can be a part of many teams simultaneously.



Ref: ATP 6-22.6 (Oct '15), fig. 1-1. *Army team building process*.

I. Fundamentals of Army Team Building

Army organizations rely on effective teams to complete tasks, achieve objectives, and accomplish missions. The ability to build teams through mutual trust and maintain effective, cohesive teams throughout military operations is an essential skill for all Army commanders, staffs, and leaders. Faced with many different types of missions and joint operations in an operational environment, building and maintaining effective teams is a constant challenge for leaders. Building a successful team is challenging, but the positive benefits of teamwork in a cohesive, effective team are well worth the effort and time it takes. These benefits enhance the performance of the team, improve the skills of the individual team members, and build important relationships with other organizations and unified action partners for the present and future.

Building cohesive teams through mutual trust and creating a shared understanding within those teams are two principles that guide commanders in exercising mission command. Mission command is the exercise of authority and direction by the commander using mission orders to enable disciplined initiative within the commander's intent to empower agile and adaptive leaders in the conduct of unified land operations

II. Team Building Stages

Ref: ATP 6-22.6, *Army Team Building* (Oct '15), pp. 1-2 to 1-3.

Developing cohesive teams is a process that transforms groups of people into effective teams that are able to accomplish missions and perform tasks. This continuous process helps newly formed teams from initial orientation and integration through mission accomplishment. Team leaders and team members must know and understand the stages in this process so they can identify them as the team develops and progresses. Identifying and monitoring each stage allows the team to move toward the next step.

Team Building Stages

The three stages of team building are the:



Formation Stage



Enrichment Stage



Sustainment stage



I. Formation Stage

Team leaders have an instrumental role in how a team works together, beginning with team formation. Team leaders assemble the team and provide the team direction. The formation stage is important because the team members get to know one another, exchange some personal information, and make new friends. This is also a good opportunity to see how each member of the team works as an individual.

Formation begins with receiving new team members. The new member reception and orientation creates the first impression that affects the person's opinion of the team. Having a good experience when joining an organization makes it easier for a new member to fit in and to contribute to the team effort. The team leader prepares the team to work, which involves orienting team members to the team's mission, goals, and objectives. The team leader sets the team on a path to success by assigning team roles and responsibilities appropriately to team members with the right capabilities.

The principal work for the team during the formation stage is to create a team with a clear structure, goals, direction, and roles so that members begin to build trust, understand how to collaborate, and learn to communicate effectively.

See pp. 4-7 to 4-16 for discussion of the formation stage.

II. Enrichment Stage

During the enrichment stage, the team members build commitment to the team. Commitment is the foundation for synergy in groups when individuals put aside personal needs for the benefit of the team. The team begins to work together effectively as individual

I. Formation Stage

Ref: ATP 6-22.6, *Army Team Building* (Oct '15), chap. 2.

The formation stage is critical to the success of the team. During this stage, team members build confidence and trust in each other. Team members show characteristic behaviors in each stage, and each phase has unique highs and lows, as individuals assume their roles and come to a greater understanding of themselves and each other.

Formation Stage

There are three critical components of the formation stage of team building:



Assemble the Team



Build Trust



Communicate Effectively

In the formation stage, team members may not know one another very well. Communication among members is functional and noncontroversial. The team is thinking short term and members' focus is more on the task at hand than on process improvement. Team members may have conflicting opinions and different approaches to solving problems. They may even resist the team leader as the team develops. Strong team leaders address the needs of team members at each stage to minimize conflict and reach higher performance levels quickly.

I. Assemble the Team

In the early stage of a team's development, leaders face the task of assembling the individuals who will comprise the team. In most cases, leaders will not have the opportunity to select some or all of the team members who will become part of the team. When operating internally, leaders select team members, but this is rare when working with joint, interagency, and multinational partners.

Whatever the involvement is in forming the team, team leaders determine how to organize a collection of individuals into an effective team. To assemble a group of individuals into a team, leaders manage a number of considerations. To assemble a team, a team leader must be prepared to—

- Integrate new team members.
- Get the team ready to work.
- Understand team dynamics.
- Manage the team's workflow.

A. Integrate New Team Members

The reception and orientation steps during the formation stage are important to build an effective team. Teams work best when new members quickly feel that they are a part of the team. How thoroughly and thoughtfully the team leader welcomes and orients new team members influences how quickly they develop trust and commitment. Teams build trust and commitment from the beginning by sharing the team's vision and ensuring that team members understand their roles and responsibilities. There are two critical steps to integrating new team members—reception and orientation.

Reception

The reception step establishes a cohesive team, and it establishes a positive first impression of the team. The reception step should be such that the new member wants to become part of the team. Reception includes the team leader welcoming the new member to the organization. The team-building process starts with reception and integration counseling. Reception and integration counseling identifies and helps fix any problems or concerns that new members have, and it explains the standards. It clarifies responsibilities and sends the message that the leaders of the team care. Reception and integration counseling should begin immediately upon arrival, so the new team member quickly integrates into the organization.

Developing a standardized plan for all new members ensures that all team members receive the same information. Before a new team member's arrival, team leaders can send a welcome letter including sponsor information and in-processing information. Once new team members arrive, they will begin reception. This includes assignment to a specific duty position, timely and accurate in-processing to the installation, and issue of additionally authorized personal equipment.

Orientation

Orientation takes place after most administrative in-processing is complete. An effective orientation program is essential. New team members have many questions, and a well-designed orientation program will help get them integrated into the team quickly and efficiently. During orientation, a new member meets the team, learns the workplace layout and schedule, and learns about the environment. The orientation step communicates team standards and values, goals and missions, and should include the team's history.

The orientation step starts new members out in the right direction. Whether the orientation is conducted with a group or individually, it is important that the team leader spend time in a face-to-face conversation with the new team members. Getting to know each team member establishes the trust necessary for team cohesiveness. Orientation solidifies new members' relationship with the team. It fuels their enthusiasm and guides their steps into a positive relationship with other team members. If done poorly, reception and orientation leave new team members with concern about their future with the team. A good experience joining the team makes it easier for the new member to fit in and to contribute to the team effort.

Socialization Process

New team members go through a socialization process. During socialization, they learn what the team expects of them, and they learn accepted norms and standards. The socialization process begins before a new team member reports to the unit. Corresponding with a new arrival gives the team leaders the opportunity to explain team values and standards. As part of integrating into the team, new members are individually committed to the team and internalize the values of the team. This helps them establish a bond with other members of the team.

The first goal of socialization is commitment, and it is comparable to the amount of selfless service a team member contributes to the team effort. The second goal of socialization is for new team members to adopt and internalize the values and attitudes of the team. Innovation is the third goal of the socialization process. If a leader

Rapidly Formed Teams

Ref: ATP 6-22.6, *Army Team Building* (Oct '15), pp. 2-11 to 2-13.

A rapidly formed team is composed of two or more individuals who come together due to either environmental demands or the need for people with specific expertise. For example, a team may be needed to accomplish a specific goal, such as rescue someone who is wounded, or respond to the scene of a vehicular accident. Other rapidly formed teams may come together to solve a specific problem, such as brainstorming for mission analysis, or they may become an Army design planning team.

Rapidly formed teams must be ready to work very soon after forming, whether in just a few hours or up to several weeks after they are created. They often face high stakes problems because they operate in dynamic, temporally constrained situations. These dynamic situations are characterized by the need to make complex decisions quickly, evolving and ambiguous situations, information overload, strict time pressures, adverse physical conditions, or severe consequences for error.

Teams developed rapidly may or may not be composed of team members that understand one another and have performed together before. Either way, they must be ready to function as a cohesive whole in a short period. To rapidly integrate individuals into a team, team leaders may—

- Use a personal histories exercise to introduce team members.
- Identify commonalities among team members.
- Share leadership responsibilities with team members to instill personal responsibility.
- Formulate operating guidelines to promote open discussion.
- Provide feedback on the team's process and performance on a regular basis.
- Get team members invested in the task—link the task to their personal values and goals.
- Make sure all members are present for the first meeting.

These activities do not need to take long to conduct, but they are critical to performance. Spending even just a few minutes getting team members familiar with one another's experiences and getting them invested in the purpose of the task can be critical for subsequent performance. If there is not much time available, team leaders concentrate on identifying commonalities, getting team members invested, and continuing to provide feedback on how the team is doing throughout the life of the team. To rapidly develop a team, team leaders may—

- Define the goal.
- Work collaboratively.
- Recognize differences.
- Determine motivation.
- Clarify roles and responsibilities.
- Develop shared understanding.
- Develop team goals and expectations.

II. Enrichment Stage

Ref: ATP 6-22.6, *Army Team Building* (Oct '15), chap. 3.

Enrichment is the process of enhancing teamwork, improving cohesion, and developing team norms. All team members must be committed to working as a team and realize that others depend on them. It is important to build commitment and keep the team motivated during the enrichment stage, as the team continues to learn how to work together.

Enrichment Stage



Build Commitment



Build Shared Competence



Motivate Team Members



Build Shared Confidence



Build Shared Accountability



Develop Cohesion

During the enrichment stage, teams will usually build commitment and develop shared competence and shared confidence, which will allow them to develop cohesion. A team that has commitment creates clarity around direction and priorities, which aligns the entire team around common objectives. Effective teams develop the ability to learn from mistakes and take advantage of opportunities. They are able to move forward or change direction without hesitation.

I. Build Commitment

Commitment is an individual's motivation and willingness to belong to the team and help achieve the defined goals. Building commitment is a process involving everyone on the team. Soldiers and Department of the Army Civilians foster an enduring commitment to the Army, its mission, its people, and the continued practice of the fundamental aspects of the Army culture. Commitment to the purpose and values of an organization provides a clear sense of direction.

I. Train to Win in a Complex World

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), chap 1

The Army trains to win in a complex world. To fight and win in a chaotic, ambiguous, and complex environment, the Army trains to provide forces ready to conduct unified land operations. The Army does this by conducting tough, realistic, and challenging training. Unit and individual training occurs all the time—at home station, at combat training centers, and while deployed.

Army forces face threats that will manifest themselves in combinations of conventional and irregular forces, including insurgents, terrorists, and criminals. Some threats will have access to sophisticated technologies such as night vision systems, unmanned systems (aerial and ground), and weapons of mass destruction. Some threats will merge cyberspace and electronic warfare capabilities to operate from disparate locations. Additionally, they may hide among the people or in complex terrain to thwart the Army's conventional combat overmatch. Adding to this complexity is continued urbanization and the threat's access to social media. This complex environment will therefore require future Soldiers to train to perform at the highest levels possible.

Principles of Training

- **Train As You Fight**
- **Training Is Commander Driven**
- **Training Is Led By Trained Officers and Noncommissioned Officers (NCOs)**
- **Train To Standard**
- **Train Using Appropriate Standard**
- **Training Is Protected**
- **Training Is Resourced**
- **Train To Sustain**
- **Train To Maintain**
- **Training Is Multiechelon and Combined Arms**

Ref: FM 7-0 (Oct '16), p. 1-4. See pp. 5-26 to 5-27 for discussion of each of these principles from ADP 7-0.

Training is the most important thing the Army does to prepare for operations. Training is the cornerstone of readiness. Readiness determines our Nation's ability to fight and win in a complex global environment. To achieve a high degree of readiness, the Army trains in the most efficient and effective manner possible. Realistic training with limited time and resources demands that commanders focus their unit training efforts to maximize training proficiency.

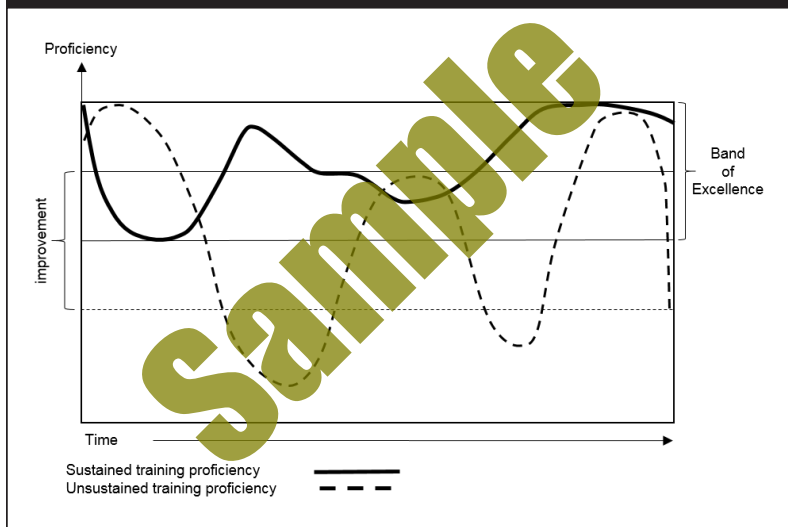
II. Training Proficiency

Proficiency in individual, leader, and collective tasks is measured against published standards. Proficiency is recognized as complete task proficiency, advanced task proficiency, basic task proficiency, limited task proficiency, and cannot perform the task.

A. Sustaining Proficiency - the Band of Excellence

A unit's training readiness is directly tied to its training proficiency. That proficiency naturally fluctuates over time and in response to various factors. Each unit encounters and adjusts to these factors, including training frequency, key personnel turnover, new equipment fielding, and resource constraints. Well-trained units seek to minimize significant variances in achieved training proficiency over time. This is training in a band of excellence. This common sense approach precludes deep valleys in proficiency that occur when units lose their training proficiency. Failing to sustain proficiency requires more resources and time to retrain the unit. Training within a band of excellence is the key to sustaining long-range training readiness.

Band of Excellence



Ref: FM 7-0 (Oct '16), fig. 1-1. Sustaining proficiency within a band of excellence.

Effective commanders take the unit from a training start point, attain the required training proficiency, and maintain that proficiency over time. Once training proficiency is attained, the unit strives to maintain that proficiency within a band of excellence. The commander who understands factors that negatively affect training proficiency can better plan so that unit training skills do not atrophy to a less than acceptable level.

To adjust to the anticipated highs and lows of training proficiency, commanders continually assess training plans and strategies to keep the unit mission-ready over long periods. This assessment may cover individual memory degradation, skill degradation, unit personnel turnover, changes in crew assignments, and changes in key leadership. Maintaining high levels of proficiency may prove more difficult than building proficiency from a training start point. By understanding and predicting the factors that affect training proficiency, commanders can mitigate those effects and maintain higher levels of training readiness longer.

Training Proficiency Ratings

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), p. 1-2.

The proficiency ratings are as follows:

- T is fully trained (complete task proficiency).
- T-is trained (advanced task proficiency).
- P is practiced (basic task proficiency).
- P-is marginally practiced (limited task proficiency).
- U is untrained (cannot perform the task).

T (Fully Trained)

A T proficiency rating means a unit is fully trained. It has attained task proficiency to the Army standard, achieved a GO in 90% or more of both performance measures and leader performance measures, and has met 100% of all critical performance measures. The task is externally evaluated and meets the remaining requirements as outlined in the training and evaluation outline (T&EO) in accordance with the objective task evaluation criteria matrix. (See appendix B for a detailed explanation of the objective task evaluation criteria matrix.)

T- (Trained)

A T-proficiency rating means a unit is trained. It has attained advanced task proficiency free of significant shortcomings, achieved a GO in 80% or more of both performance measures and leader performance measures, and has met 100% of all critical performance measures. The unit's shortcomings require minimal training to meet the Army standard. The task is externally evaluated and meets the remaining requirements as outlined in the T&EO in accordance with the objective task evaluation criteria matrix.

P (Practiced)

A P proficiency rating means a unit is practiced. It has attained basic task proficiency with shortcomings, achieved a GO in 65% or more of all performance measures, achieved 80% or more of all leader performance measures, and has met 100% of all critical performance measures. The unit's shortcomings require significant training to meet the Army standard. The task is not externally evaluated and meets the remaining requirements as outlined in the T&EO in accordance with the objective task evaluation criteria matrix.

P- (Marginally Practiced)

A P-proficiency rating means a unit is marginally practiced. It has attained limited task proficiency with major shortcomings, achieved a GO in 51% or more of all performance measures, achieved less than 80% of all leader performance measures, and has met less than 100% of all critical performance measures. The unit's shortcomings require complete retraining of the task to achieve the Army standard. The task is not externally evaluated and does not meet the remaining requirements as outlined in the T&EO in accordance with the objective task evaluation criteria matrix.

U (Untrained)

A U proficiency rating means a unit is untrained. The unit cannot perform the task. It achieved a GO in less than 51% of all performance measures, less than 80% in all leader performance measures, and less than 100% in all critical performance measures. The unit requires complete training on the task to achieve the Army standard.

B. Top-Down/Bottom-Up Approach to Training

A top-down/bottom-up approach to training reflects a team effort with commanders and their subordinate leaders. Commanders provide top-down guidance in the training focus, direction, and resources while subordinate leaders provide feedback on unit task proficiency, identify needed training resources, and execute training to standard. This team effort helps maintain training focus, establishes training priorities, and enables effective communication between command echelons.

Top-down Guidance/Bottom-up Feedback

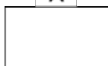
Top-down guidance

provides subordinate leaders an understanding of the higher commander's training guidance. This enables subordinate leaders to begin planning how their own units will support that guidance.

XX



X



...



Bottom-up feedback

provides commanders necessary information about the state of unit training proficiency at lower echelons. This helps shape a more accurate picture of the unit's overall training readiness.

Ref: FM 7-0 (Oct '16), fig. 1-2. Top-down training guidance and bottom-up feedback.

Training guidance flows from the top down and results in subordinate units' identification of specific collective and individual tasks that support the higher unit's mission. Subordinates provide bottom-up feedback. This input from the bottom up identifies the current state of training proficiency for collective and individual tasks at lower echelons. This input helps the commander objectively determine unit training readiness.

C. Training Subordinates in Mission Command

Mission command is the exercise of authority and direction by the commander using mission orders to enable disciplined initiative within the commander's intent to empower agile and adaptive leaders in the conduct of unified land operations (ADP 6-0). As the Army's philosophy of command, mission command emphasizes that command is essentially a human endeavor. Successful commanders understand that their leadership directs the development of teams and helps establish mutual trust and shared understanding throughout the force. Commanders provide clear guidance that directs subordinates' actions while promoting freedom of action and initiative.

II. Training for Battle Rhythm

Ref: FM 7-0, Train to Win in a Complex World (Oct '16), pp. 1-11 to 1-20.

Commanders integrate and synchronize training activities, meetings, briefings, conferences, and reports among their subordinates and with their higher commander. Commanders establish training for a unit's battle rhythm. Battle rhythm is a deliberate cycle of command, staff, and unit activities intended to synchronize current and future operations (FM 6-0). In the context of unit training, establishing a battle rhythm helps sequence the activities, events, and actions that regulate the flow and sharing of information that supports the training process. Effectively training for battle rhythm—

- Facilitates and establishes interactions related to training among the commander, staff, and subordinate units.
- Establishes a routine for staff interactions and coordination.
- Facilitates planning by the staff and decision making by the commander.

Training for a unit's battle rhythm consists of conducting periodic meetings and briefings, meeting report requirements, and experiencing other activities synchronized by time and purpose. These activities and products include, but are not limited to—

- Publishing command training guidance (CTG).
- Training meetings.
- T-Week concept.
- Training briefings.
- Installation training resource synchronization conferences.
- Commanders' dialogues.
- Time management cycles.
- UTP calendars.
- Company training schedules.
- Planning horizons (long, mid, and short).

The unit commander, in conjunction with the higher commander's guidance, establishes and enforces the training for the unit's battle rhythm. These activities are heavily influenced by policy, doctrine, unit standard operating procedures (SOPs), and training priorities established by the higher commander. All unit leaders understand and comply with the activities that comprise the training rhythm.

Training Plans Tied to Resources Needed to Train

Without the right resources, effective training will not occur. Available resources directly affect unit training readiness. Each commander and staff understands the resource coordination and synchronization cycle on the installation on which units conduct training. Commanders and staffs coordinate and synchronize procedures for the normal classes of supply; training aids, devices, simulators, and simulations (TADSS); integrated training environment (ITE) considerations and resources; and available training facilities. At a home station, all training resources are limited and shared with other units on the installation. Commanders and staffs aware of an installation's resource cycle are more likely to secure the right training resources when they are needed to train.

I. Published Training Guidance (CTG/UTP) (Training for Battle Rhythm in Units)

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. 1-11 to 1-14.

So that commanders and units have sufficient time to plan and coordinate long-range training, senior commanders publish CTG. Published guidance communicates their training and readiness priorities throughout the command and provides subordinates sufficient time to develop and resource training that supports that guidance. Publication of the CTG establishes the unit's training for battle rhythm when it is not deployed on operations.

See p. 6-17 for discussion of CTG.

For the Regular Army and Reserve Component, each successive echelon publishes their nested CTG. For division and higher units, the format of the CTG is at the commander's discretion. For brigade and below units, the format is the UTP operation order (OPORD). A published CTG always includes the corresponding training calendar.

See pp. 6-37 to 6-40 for further discussion of UTP operation order (OPORD).

The timelines in table 1-1 provide guidance for when CTG or UTPs are published by echelon for the Regular Army. This separation by echelon ensures that long-range planning and guidance is timely and allows each command to conduct parallel and collaborative planning across the force. It also ensures that crucial training resources needed to train are identified well in advance and are available at the start of training. Table 1-2 shows the same information for the Reserve Component (known as RC). Note that Regular Army and Reserve Component units' CTG planning horizons significantly differ. For example, a Regular Army division commander's long-range planning horizon is two years, whereas a like echelon Reserve Component unit commander's long-range planning horizon is five years.

Echelon	Publishes CTG with calendar NLT ¹ :	Planning horizon	
Corps	12 months prior to training start	2 years	
Division	10 months prior to training start	2 years	
Installation	10 months prior to training start (calendar only)	1 year	
Brigade	8 months prior to training start	1 year	
Battalion ²	6 months prior to training start	1 year	
¹ Publication dates also apply to similar command-level TDA organizations or activities. For example, a TRADOC COE normally commanded by a major general follows the same planning cycle as a division commander.			
² Companies develop and publish their own UTP. The battalion commander, in collaboration with subordinate company commanders and the battalion staff may develop a consolidated battalion UTP.			
COE	center of excellence	TDA	table of distribution and allowances
CTG	command training guidance	TRADOC	Training and Doctrine Command
NLT	no later than	UTP	unit training plan

Ref: FM 7-0 (Oct '16), table 1-1. Regular Army long-range planning by echelon.

Echelon	Publishes CTG with calendar NLT ¹ :	Planning horizon	
Flag officer CMD, separate brigade, regiment or group	18 months prior to training start	5 years	
Brigade or separate battalion	10 months prior to training start	5 years	
Battalion ²	6 months prior to training start	2-3 years	
1 These actions also apply to similar command-level TDA organizations or activities. For example, a regional support command, commanded by a major general follows the same planning cycle as a division commander.			
2 Companies develop and publish their own UTP and calendar. The battalion commander, in collaboration with subordinate company or troop commanders, and the battalion staff may consolidated a battalion UTP.			
CMD	command	TDA	table of distribution and allowances
CTG	command training guidance	UTP	unit training plan
NLT	no later than		

Ref: FM 7-0 (Oct '16), table 1-2. Reserve Component long-range planning by echelon.

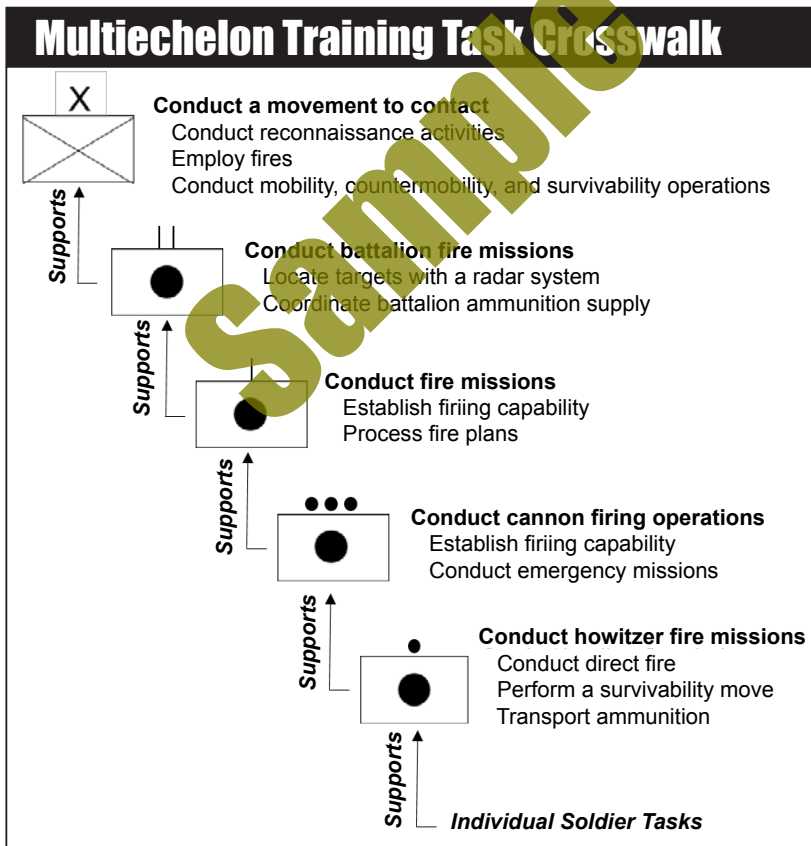
III. Multiechelon Training

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. 1-14 to 1-15.

Multiechelon training is a training technique that allows for the simultaneous training of more than one echelon on different or complementary tasks (ADRP 7-0). As each echelon conducts its mission analysis to determine the tasks to train, it provides a logic trail from individual Soldier tasks to brigade-level METs. An effective logic trail clearly nests from one echelon to the next and effectively crosswalks the tasks up the echelons and down the echelons. Although not an integral part of planning, this task crosswalk enables leaders to visualize how the top-down training guidance directly supports the bottom-up alignment of individual and collective tasks that support the higher unit.

To illustrate this concept, see figure 1-8. In this example, an infantry brigade combat team (known as IBCT) commander focuses training on offensive operations—specifically conduct a movement to contact—and states this in the training guidance.

Through mission analysis, the subordinate artillery battalion commander determines that to support a brigade movement to contact, the battalion needs to focus training on the task, Conduct Battalion Fire Missions. Likewise, other subordinate commanders do their mission analyses to determine the collective tasks on which they must focus training to support the brigade commander's guidance.



Ref: FM 7-0 (Oct '16), fig. 1-8. Multiechelon training task crosswalk.

Principles of Leader Development

Ref: ADP 7-0, *Training Units & Developing Leaders* (Aug '12), pp. 7 to 9.

Leaders follow the principles of leader development to develop other leaders. Schools provide leaders with enough fundamental information to help them contribute to unit collective capabilities on the day they arrive in the unit. However, most leader development occurs during operational assignments. In operational assignments, leaders learn to adapt to new situations and develop on the job through training and education. More significantly, they develop through challenging, unfamiliar experiences that require them to adapt theory to reality. They learn through regular and as-needed feedback. They learn from their mistakes. They learn to take risks and experiment with non-textbook solutions to problems. They learn what they do not know and fill the gaps through self-development. Operational assignments are the crucible of leader development.

1. Lead by Example

Good leaders understand they are role models for others and reflect the desired leader characteristics found in ADP 6-22.

2. Develop Subordinate Leaders

Leaders have the responsibility for developing subordinate leaders. It is one of their most important functions. They train subordinates to be successful tactically and technically and to be prepared to assume positions of greater responsibility.

3. Create a Learning Environment for Subordinate Leaders

Leaders establish in their units an environment that allows subordinates to try different solutions to problems. Subordinates must know that they can attempt innovative solutions to problems. Leaders establish an environment for subordinates that allows subordinate leaders to make honest—as opposed to repeated or careless—mistakes without prejudice.

4. Train in the Art and Science of Mission Command

Effective leaders conduct operations while exercising mission command (addressed in ADP 3-0 and ADP 6-0). Employing mission command in training encourages risk-taking, initiative, and creativity in subordinates, while staying within the commander's intent.

5. Train to Develop Adaptive Leaders

Training must enable leaders to respond to unexpected conditions in a positive and constructive way. They cannot train on every task for every condition. Instead, they must excel at a few tasks and then adapt to new tasks.

6. Train Leaders to Think Critically and Creatively

Leaders must be able to analyze challenging problems, keeping an open mind on different perspectives of problems and unconventional ways of solving problems. Critical thinking and creativity are not necessarily inherent; however, leaders can develop them.

7. Train Your Leaders to Know Their Subordinates and Their Families

All leaders should know their subordinates at least two levels down—their strengths, weaknesses, and capabilities. The Army trains leaders to know and help not only subordinates, but also their families.

Chap 6

Unit Training Management (UTM)

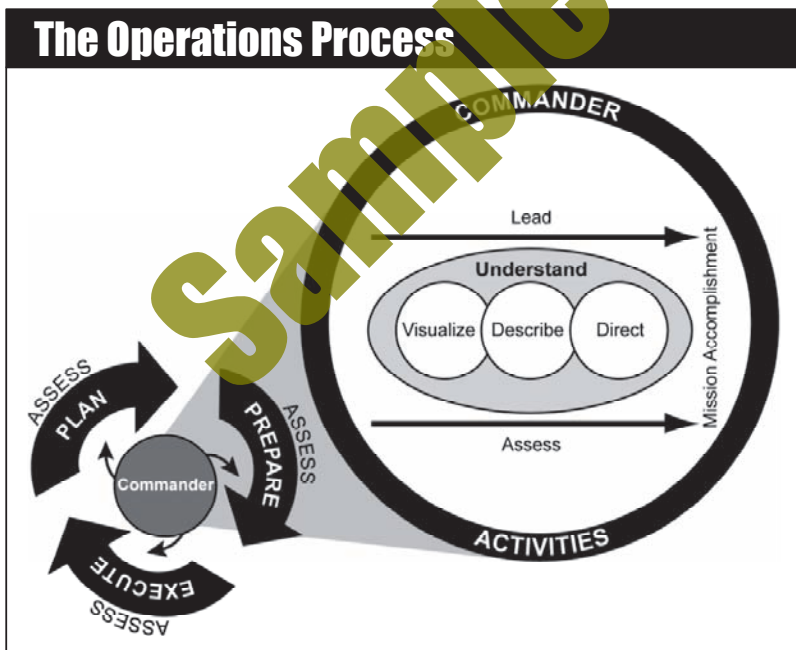
Ref: ADRP 7-0, *Training Units & Developing Leaders* (Aug '12), chap. 3 and FM 7-0, *Train to Win in a Complex World* (Oct '16), chap 2.

This section discusses how the Army manages unit training using the operations process. It explains the planning, preparation, execution, and assessment of training.

The Operations Process in Unit Training and Leader Development

The operations process in unit training and leader development uses unit training management (UTM) to detail the Army training management processes. UTM is delivered in several ways for Soldiers to use. The primary portal to UTM is through the Army Training Network (ATN). This password-protected Web site enables users to view UTM modules, tutorials, and examples. UTM mirrors the Army's method to plan and operate rather than the artificialities of a distinct and separate training management process.

See following pages (pp. 6-2 to 6-3) for an overview of UTM modules and tutorials.



Unit Training Management

Ref: ADRP 7-0, *Training Units and Developing Leaders* (Aug '12), fig. 3-1, p 3-2.

The Army's operations process provides a common framework for guiding commanders as they lead and manage unit training and leader development. Effective unit training results from a sound analysis of the unit's mission and its ability to accomplish that mission. The higher unit's mission, the unit mission essential task list (METL), and higher commander's guidance drive the commander's selection of collective tasks on which the unit trains to accomplish mission success.

See p. 6-4 for discussion of the operations process in unit training & leader development.

Ia. Unit Training Plans (UTP) Overview

Ref: ADRP 7-0, *Training Units & Developing Leaders* (Aug '12), chap. 3.

Commanders and other leaders plan to develop their subordinate leaders—through training, education, and experience—in the three training domains (institutional, operational, and self-development). Leaders use the operations process to integrate leader development into a unit training plan.



Ref: ADRP 7-0, *Training Units and Developing Leaders* (Aug '12), fig. 3-2, p. 3-3.

The commander is central to determining the few tasks on which the unit must train. Commanders, with the assistance of unit leadership, follow the operations process. The Army operations process (see ADRP 3-0) consists of plan, prepare, execute, and assess. Commanders first plan for training. They identify the collective tasks on which to train, identify, and sequence training events; identify resources required; and provide the guidance necessary to achieve mission readiness. While commanders plan, they exercise mission command to enable their subordinates to determine how they will achieve their training objectives. Thorough preparation ensures that training conditions reflect the expected mission and that commanders have the resources and enablers necessary to train. Commanders then execute the training. Lastly, they assess the training. Assessments help commanders determine if units need to retrain tasks and if the training plan requires modification.

I. Planning for Unit Training

Planning for unit training begins with the commander determining the unit mission, reviewing the unit's METL, and determining the tasks that the unit must perform to support the higher unit's mission.

Battalion Level and Higher

At battalion level and higher (units with a coordinating staff), commanders follow the steps of the military decision making process (MDMP) to plan unit training. ADRP 5-0 discusses the MDMP in detail. Some steps of the MDMP for operations translate differently for training and are addressed in this chapter.

See pp. 6-10 to 6-13 for further discussion (using the MDMP to plan unit training).

Company Level and Below

At the Company level and below (units without a coordinating staff), the troop leading procedures are used.

See pp. 6-14 to 6-15 for further discussion (using the TLP to plan unit training).

A. The Mission Essential Task List (METL)

A mission-essential task represents a task a unit could perform based on its design, equipment, manning, and table of organization and equipment/table of distribution and allowances mission. A mission-essential task list is a compilation of mission-essential tasks.

Brigade and Higher Units METL

For brigade and higher units, headquarters, the Department of the Army standardizes METLs for like-type units. The **standardized METL** represents the tasks of decisive action that a unit could perform based on its table of organization and equipment or table of distribution and allowance. A unit given a non-standard mission (such as an artillery unit given a transportation unit mission) will not change its standardized METL; instead, it will determine the additional transportation unit tasks it must train for the mission. When reporting its readiness to headquarters, Department of the Army, the commander rates only the mission-essential tasks (METs) in the standardized METL. A unit does not have the resources to train on every MET; therefore, units sometimes only partially train or not train on some METs.

Battalion and Company Level METL

At the battalion and company levels, the higher commander collaborates with the subordinate commander on the latter's METL. A METL at battalion and company levels can be a universal joint task list (known as the UJTL) task, an Army tactical task from the Army universal task list (known as the AUTL), a Combined Arms Training Strategies (CATS) task selection, a task group from the brigade or higher unit Department of the Army standardized METL, or a major collective task. The higher commander approves the subordinate unit's METL. Subordinate unit METLs align with, nest with, and support their next higher unit's METL. Subordinate unit METLs usually do not change since they are based on the higher unit's METL and the unit's designed mission. Based on the unit's METL and the higher commander's guidance, the unit trains on the supporting collective tasks most important to the success of the mission and gives the unit the most flexibility to adapt to new missions.

Because training time and other essential resources are often limited, units cannot train all the METL tasks to proficiency at once. Based on the unit mission and higher commander's guidance, commanders use the unit METL as a primary source to select the few, most important supporting collective tasks to train.

B. Training Assessments

Training assessments provide focus and direction to planning by identifying training tasks that are new, where performance needs improvement, or where performance needs to be sustained. Training assessments provide commanders with a starting point for describing their training strategy. The training assessment compares the organization's current level of training proficiency with the desired level of proficiency based on Army standards. This results in training requirements that are necessary to achieve and sustain mission-essential task proficiency. The commander, assisted by key leaders, develops a training strategy that meets each training requirement.

See chap. 8, Assessing Training, for further discussion.

C. Training Objectives

After mission-essential tasks are selected, commanders identify training objectives for each task. A training objective is a statement that describes the desired outcome of a training activity in the unit. It consists of the task, conditions, and standard:

Task

A clearly defined and measurable activity accomplished by individuals and organizations.

Conditions

Those variables of an operational environment or situation in which a unit, system, or individual is expected to operate and may affect performance.

Standard

A quantitative or qualitative measure and criterion for specifying the levels of performance of a task. A measure provides the basis for describing varying levels of task performance.

The conditions and standards for the majority of a unit's collective training tasks are identified in applicable training and evaluation outlines. A training and evaluation outline is a summary document that provides information on collective training objectives, related individual training objectives, resource requirements, and applicable evaluation procedures for a type of organization.

D. Training Strategy

A training strategy describes the ways and means the commander intends to use to achieve and sustain training proficiency on mission-essential tasks. The strategy is based on the commander's assessment and discussions with the higher commander. Training strategies include the following:

- Tasks to be trained
- Training audience
- Training objectives
- Order in which the tasks are to be trained, given limited time and other resources
- Frequency at which tasks are trained
- Types of events used to create conditions for training tasks
- Conditions under which the tasks are to be trained
- Resources required to execute the training strategy
- Alternative ways of training tasks

II. Training Briefings

Commanders brief the plan to the next higher commander. This briefing formalizes the plan and the resources required to support it. The training briefing focuses exclusively on unit training and leader development planning; it does not cover other administrative matters. The training briefing is concise and focused. The training briefing is a contract between commanders. The unit commander agrees to train as described in the plan, and the higher commander approves the plan and agrees to provide resources to execute it. If the subordinate unit is deploying under another headquarters, the gaining commander or a representative participates in the briefing. The installation staff also participates in the briefing, since they manage the training support resources on the installation.

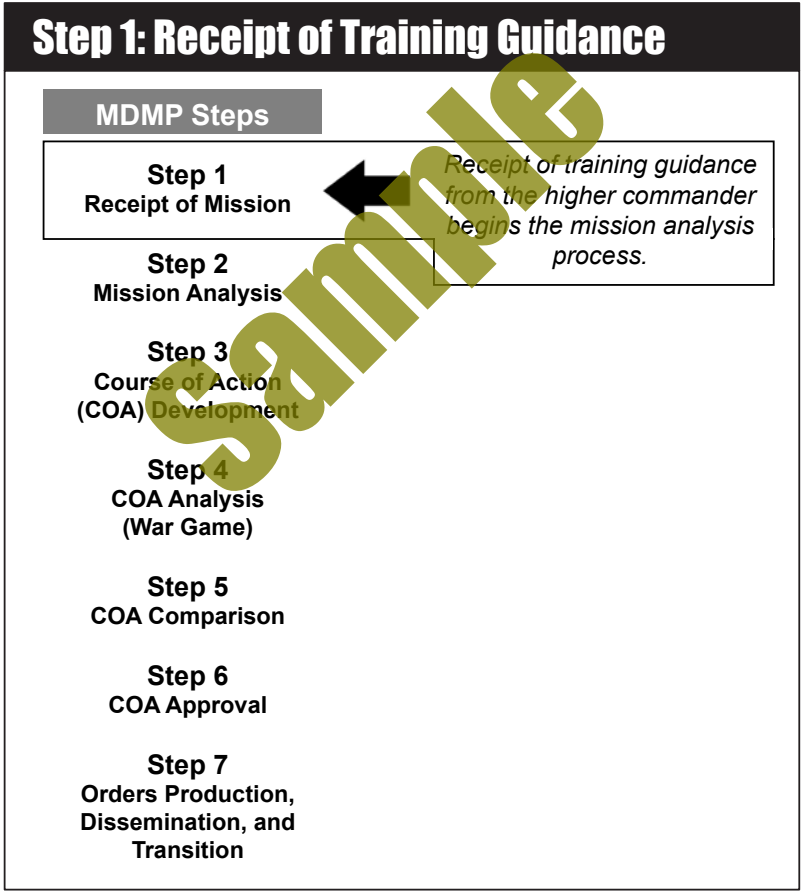
See pp. 6-77 to 6-80 for further discussion.

The following discussion from FM 7-0, *Train to Win in a Complex World* (Oct '16), focuses on the military decisionmaking process (MDMP) from a training-specific viewpoint. For complete discussion of the MDMP and TLP from FM 6-0, *Commander And Staff Organization And Operations* (May '14), refer to "BSS5: The Battle Staff SMARTbook, 5th Ed. (Leading, Planning & Conducting Military Operations)."

Step 1. Receipt of Training Guidance

Training readiness stems from attaining proficiency in individual and collective tasks. To do that, unit commanders develop their UTP, focusing on the tasks to train, based on the higher commander's guidance. This is battle-focused training. Following the general framework of the military decisionmaking process (MDMP) (or troop leading procedures [TLP] for company and below), unit commanders begin the process to determine the METs—what to train. Training readiness is at the core of this determination—whether it is training to maintain and sustain certain capabilities or training to meet the requirements of an assigned mission.

The process of determining essential tasks begins with receipt of guidance from the higher commander.



Ref: FM 7-0 (Oct '16), fig. 2-1. Receipt of training guidance begins the planning process.

Training Guidance

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. 2-1 to 2-2.

The Army uses the operations process of plan, prepare, execute, and assess as its training framework. Using this framework, the unit commander remains central to the training process in the same way the commander is central to the operations process. Planning, preparing, executing and assessing unit training does not significantly differ from performing these activities for an operation. Each unit commander begins the training cycle with top-down training guidance from the higher commander. The receipt of guidance begins a process of determining the correct collective tasks on which to train. The commander then develops a UTP to conduct that training in the time allotted.

The resulting plan consists of training events that progressively develop task proficiency. Each training event follows a plan, prepare, execute, and assess cycle. Prior to the start of training, leaders verify availability of and coordinate for resources. Units execute training to standard, and leaders evaluate that training and determine if the unit meets proficiency standards. Leaders report to commanders on the unit's success for achieving proficiency. This bottom-up feedback provides commanders with complete information and data to accurately assess the unit and adjust training plans as necessary.

Command Training Guidance (CTG)

Guidance from the higher commander to the subordinate unit commanders begins the training planning process. This top-down CTG communicates the higher commander's training priorities and helps provide a battle focus for the entire unit. Effective communication at each echelon ensures that subordinates understand the higher commander's guidance for training, that UTPs fully support the higher unit capability or mission, and that UTPs nest at each succeeding echelon.

In the CTG, the higher commander identifies —

- The unit's training focus, including its capabilities and mission.
- The desired readiness level down to brigade.
- The long-range planning horizon.
- The installation or command time management cycle.
- Brigade-level external evaluation (EXEVAL) dates and responsibilities by unit.
- Combat training center (known as CTC) rotation dates (by unit).
- Training environments in which to train.
- Other training guidance as necessary.

Division and higher commanders determine the desired readiness levels down to brigade. (Refer to AR 220-1 for a description of readiness levels.) Due to the classification level of this information, the written CTG to subordinates does not include the desired readiness levels. Instead, the two commanders discuss and determine the desired readiness levels. This determination affects the installation-level resources priorities made by the senior commander as well as the installation time management cycle.

At division level and higher, the format of CTG is at the discretion of the commander. Many commanders use the memorandum format, while others use an OPORD format. At brigade to company level, a five-paragraph OPORD is used. Its training guidance is communicated in the UTP.

See pp. 5-12 to 5-13 for discussion of published training guidance (CTG/UTP) battle rhythm.

Step 2. Mission Analysis

On receipt of training guidance from the higher commander, the unit commander always conducts a mission analysis to understand the guidance given by the higher commander and to determine how the unit can best support that guidance. Mission analysis also starts the parallel and collaborative planning process within the command. Before beginning mission analysis, the unit commander gathers supporting references. These references provide the most current sources of information such as doctrine, technical manuals, unit SOPs, and on-line resources. Additionally, the unit commander gathers information on installation-level training resources to determine what they are, their availability, their location, and the requirements to secure them.

In conducting a mission analysis, the unit commander will—

- Identify and understand potential operational environments.
- Determine the METs to train.
- Assess the METs to train.
- Identify the long-range planning horizon.
- Identify training readiness issues.

Mission analysis provides the collective tasks on which the unit will focus its training.

Step 2: Mission Analysis

MDMP Steps

Step 1
Receipt of Mission

Step 2
Mission Analysis

Step 3
Course of Action
(COA) Development

Step 4
COA Analysis
(War Game)

Step 5
COA Comparison

Step 6
COA Approval

Step 7
Orders Production,
Dissemination, and
Transition

*Mission analysis
provides the
collective tasks
to focus unit training.*

Ref: FM 7-0 (Oct '16), fig. 2-3. Mission analysis helps determine battle focus.

Green-Amber-Red Cycle

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. 2-11 to 2-13, figure 2-11.
Multiechelon training events demonstrated in a notional UTP calendar

One time management cycle used throughout the Army is the Green-Amber-Red cycle. Many units and installations employ this time management cycle or some variation of it.

HEADQUARTERS 1 st Brigade, 52 nd Infantry Division						
	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Time management cycle →	RED		GREEN			AMBER
1 st Brigade	QTB	Brigade Gunnery	STAFFEX		CPX	QTB
2-77 Field Artillery	QTB	Brigade Gunnery	STAFFEX	FTX		QTB
Company A	QTB	Brigade Gunnery		FTX		QTB
CPX	command post exercise		QTB	quarterly training briefing		
FTX	field training exercise		STAFFEX	staff training exercise		

Green

Training is focused on multiechelon, unit collective tasks and on MET proficiency. Training is planned and synchronized with the availability of major training resources and key training facilities. Senior commanders ensure that subordinate organizations conduct training without distraction or unprogrammed external taskings.

- Requires maximum Soldier attendance at mission-essential training.
- Eliminates administrative and support requirements that prevent personnel from participating in training to the maximum extent possible.
- Limits leaves and passes.

Amber

Training is focused at the individual, leader, crew, and squad levels. Individuals maximize their own self-development by using installation education centers and distributed learning resources. Organizations are assigned support taskings beyond the capability of those units in the red cycle, but commanders strive for minimal disruptions to units in this cycle.

- Provides time for Soldiers to attend education and training courses.
- Enables some sub-organizations to schedule collective training.
- Diverts selected personnel to support requirements when all available personnel in organizations in the red period are completely committed to support requirements.
- Enables scheduling for periodic maintenance services.

Red

Training is focused to maximize self-development and individual task proficiency. Units in this cycle perform unit-level administrative requirements and allow the maximum number of Soldiers to take leave. More often, post support requirements take priority. During this cycle, leaders expand on providing additional mentoring, coaching, counselling to subordinates.

- Maximizes leaves and passes. When appropriate, unit schedules block leave.
- Coordinated and scheduled routine medical, dental, and administrative appointments with installation support facilities.

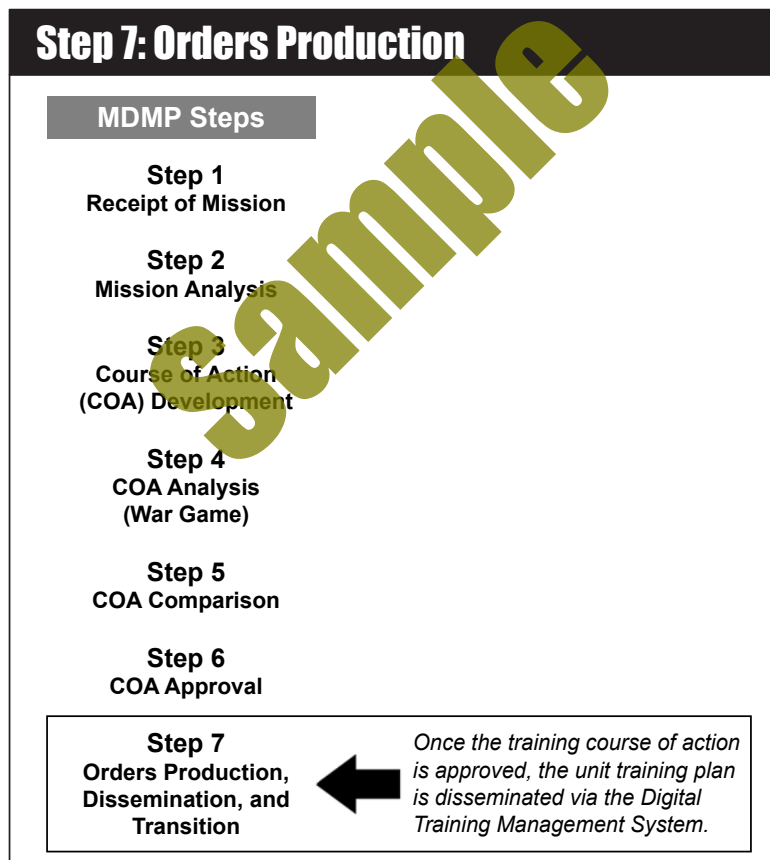
Ic. Unit Training Plan Format (OPLAN/OPORD)

Ref: ADRP 7-0, *Training Units & Developing Leaders* (Aug '12), chap. 3.

Once the higher commander approves the COA at the TB, the plan is developed as the UTP. The commander—supported by the staff at battalion and higher—begins to organize the COA, the guidance given by the higher commander, and all additional clarifying information into a five-paragraph field order. When completed, the commander disseminates it to subordinate and higher units as appropriate and posts it to the DTMS.

Step 7. Orders Production, Dissemination, and Transition

Figure F-1 below illustrates the seven steps of the MDMP. Figure F-2, on the following pages, illustrates a sample UTP OPORD for brigade, battalion, and company levels.



Ref: FM 7-0 (Oct '16), fig. F-1. *Production and dissemination of the UTP. See BSS5: The Battle Staff SMARTbook, 5th Ed. for a complete discussion on preparing an OPORD.*

Annotated OPLAN/OPORD Format

Ref: FM 7-0, Train to Win in a Complex World (Oct '16), app. F.

[CLASSIFICATION]

Place the classification at the top and bottom of every page of the OPLAN or OPORD. Place the classification marking at the front of each paragraph and subparagraph in parentheses. Refer to AR 380-5 for classification and release marking instructions.

Copy ## of ## copies

Issuing headquarters

Place of issue

Date-time group of signature

Message reference number

The first line of the heading is the copy number assigned by the issuing headquarters. A log is maintained of specific copies issued to addressees. The second line is the official designation of the issuing headquarters (for example, 1st Infantry Division). The third line is the place of issue. It may be a code name, postal designation, or geographic location. The fourth line is the date or date-time group that the plan or order was signed or issued and becomes effective unless specified otherwise in the coordinating instructions. The fifth line is a headquarters internal control number assigned to all plans and orders in accordance with unit standing operating procedures (SOPs).

OPERATION PLAN/ORDER [number] [(code name)] [(classification of title)]

Example: **OPORD 3411 (OPERATION DESERT DRAGON) (UNCLASSIFIED)**

Number plans and orders consecutively by calendar year. Include code name, if any.

(U) References: List documents essential to understanding the operation plan (OPLAN) or operation order (OPORD). For example, higher headquarters training guidance, higher headquarters directives, OPORDs, ADP 7-0, ADRP 7-0, FM 7-0, Combined Arms Training Strategies (CATSs), Army Training Network (ATN), Digital Training Management System (DTMS), and decisive action standardized mission-essential task list (METL).

(U) Time Zone Used Throughout the OPLAN/OPORD: State the time zone used in the training environment during execution. (Optional)

(U) Task Organization: Describe the organization of forces available to the issuing headquarters and their command and support relationships. Refer to Annex A (Task Organization) if long or complicated.

1. (U) Situation. Describe the conditions and circumstances of an operational environment for which the unit must train in the following subparagraphs:

a. **(U) Training Environment.** Use the operational variables to describe the environment at battalion and above and use the mission variables for company and below (a useful resource for the variables is ADRP 3-0, Operations).

b. **(U) Friendly Forces.** Briefly identify the missions of friendly forces and the objectives, goals, and missions of civilian organizations that impact the issuing headquarters.

c. **(U) Training Risk, Challenges and Resources.** List any significant training risks (such as insufficient time or resources) and challenges (such as difficulty obtaining resources or assets required to execute training) identified during planning. Describe any approved mitigating measures. This is not personnel safety risk.

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[CLASSIFICATION]

B. Training Meeting Agenda

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. C-4 to C-9.

The agenda is keyed to the T-Week concept. There are three phases to company training meetings. The first is used to assess previous training (T-Week +1). The second phase is used to coordinate upcoming events (T-Week 5 through T-Week 1). The final phase is used to plan training for future training events (T-Week 7 and T-Week 6). The agenda maintains a focus for all to see, understand, and follow. Staffs post the agenda prior to the meeting.

See pp. 6-53 to 6-76 for a detailed discussion of the T-Week Concept.

Training Meeting Phases



Review Previous Training



Review Future Training



Plan for Future Training

T-Week	Activity
T-Week 1	Review previous training
T-Week 2	Review previous training
T-Week 3	Review previous training
T-Week 4	Review previous training
T-Week 5	Review previous training
T-Week 6	Review previous training
T-Week 7	Review previous training
T-Week 8	Review previous training
T-Week 9	Review previous training
T-Week 10	Review previous training
T-Week 11	Review previous training
T-Week 12	Review previous training
T-Week 13	Review previous training
T-Week 14	Review previous training
T-Week 15	Review previous training
T-Week 16	Review previous training
T-Week 17	Review previous training
T-Week 18	Review previous training
T-Week 19	Review previous training
T-Week 20	Review previous training

T-Week Concept.
See p. 6-53.

Agenda Items

In the first phase of the training meeting agenda, the commander reviews the previous week's training:

- Update the platoon or subordinate element assessments, to include collective and individual tasks, warrior tasks, and battle drill training (T-Week +1).
- Identify training not conducted.
- Update company assessments (METs).
- Identify retraining required.
- Identify DTMS database update requirements and responsibilities.

In the second phase of the training meeting agenda, the commander coordinates by—

- Reviewing FRAGORDs that include new or updated command guidance.
- Conducting preexecution checks T-Week 5 through T-Week 1.
- Identifying any changes to upcoming events (tasks to train).

In the third phase of the training meeting, the commander discusses future planning:

- Review battalion and company UTP calendar for adjustment as needed.
- Provide commander's updated planning guidance for events (adjust training focus of events).
- Demonstrate how platoon tasks support the company METs (from the company UTP).
- Review the draft training schedule for T-Week 6 and T-Week 7.
- Review the major T-Week milestones for T-Week 8 through UTP publication, assign responsibility for the tasks, and receive updates.
- Confirm and identify additional resource requirements.

Continued on next page

Continued on next page

Time Requirements

Training meetings should not last more than an hour and a half if well organized. The intent is for the commander to achieve the meeting objectives as quickly and efficiently as possible.

Action	Time
Review of previous week's training	30 Minutes
Preparation for T-5 through T-1 training	30 Minutes
Future planning (T-7 and T-6), including a review of major milestones (T-8 through UTP publication)	30 Minutes
T training week	UTP unit training plan

Ref: FM 7-0 (Oct '16), table C-1. Approximate times for each phase of a training meeting.

Phase I: Review Previous Training

Review Last Week's Training

Commanders begin the meeting by discussing the training just completed. The bottom-up input by the platoon leaders and platoon sergeants is critical to assessing collective, leader, and individual training proficiency of the unit. Company leaders discuss the agenda items listed below and then record the assessments in DTMS.

Platoon Assessment

Platoon leaders and platoon sergeants assess collective and battle task proficiency ratings and Soldier proficiency ratings since the last training meeting. The sources of the platoon assessment may be formal or informal and based on the task T&EO. A platoon assessment includes—

- Collective tasks, battle tasks, leader tasks, Soldier tasks, warrior tasks, battle drills.
- The proficiency rating—fully trained (T), trained (T-), practiced (P), marginally practiced (P-), and untrained (U)—of all training conducted by the platoon assessments from T&EOs (also GO and NO-GO results from the performance steps, as necessary).

Training Shortfalls

As each platoon completes the training assessment, leaders address training shortfalls. A training shortfall occurs when a unit plans training but does not conduct it. Platoon leaders must explain to the commander the reasons for not executing training and the plans to reschedule the missed training. A training shortfall also occurs when a unit fails to meet training objectives. If a unit fails to meet objectives, it must retrain on those tasks until it earns a fully trained (T) or trained (T-) proficiency rating score. Commanders record training shortfalls that include—

- Training planned but not conducted (include discussion of tasks not trained).
- The reason for not executing training.
- A retraining plan, if needed.

Assessment of completed training may reveal training that is incomplete or not conducted to the Army standard. Leaders conduct retraining at the first opportunity, ideally during the same training period. However, when this cannot happen, leaders may need to adjust subsequent training events (adding or subtracting tasks to train) to retrain on those tasks that the unit failed to train to standard. Staff then adjust the UTP for future events.

In reviewing retraining requirements, company leaders consider several factors:

- The number of Soldiers or elements involved.
- The sequential order of retraining with other planned training. Leaders determine if one task needs to be trained before proceeding to a future task.
- Resource availability (such as ranges, instructors, and logistics).
- Original planning and modification for the task, as necessary.

III. T-Week Concept (Training Schedules)

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), app. H.

The T-Week concept provides a detailed, backward-planning approach when planning training events. This concept also provides important considerations and specific activities for training event planning and coordination. Depending on the scope and complexity of the event, effective planners adjust activities that occur in each T-Week to fit resourcing and coordination requirements. When followed, planners ensure that they complete all actions to identify and coordinate leader and resource requirements prior to training. Each week previous to the execution of training requires planners to carefully coordinate all necessary training resources. These may include training areas, Class V requisitions, convoy clearances, and personnel certifications.

T-Week Concept		
T-Week	Actions	
UTP publication to T-13	Identify major training facilities	
Week T-12	Conduct training event mission analysis	
Week T-11	Refine training event requirements	
Week T-10	Publish WARNORD and begin preexecution checks	
Week T-9	Confirm resource requests	
Week T-8	Execute reconnaissance and lock in resources	
Week T-7	Publish the training event OPORD	
Week T-6	Lock in training; publish training schedules	
Week T-5	Complete plan and supporting products	
Week T-4	Conduct certifications and complete prerequisite training	
Week T-3	Conduct rehearsals	
Week T-2	Finalize support and conduct OPFOR rehearsal	
Week T-1	Draw equipment and supplies and execute subordinate rehearsals and checks	
T-Week	Execute training	
Week T+1	Recover, conduct final AARs, and assess training	
AAR	after action review	OPORD operation order
OPFOR	opposing force	WARNORD warning order

Ref: FM 7-0 (Oct '16), table H-1. *Illustrative T-Week concept. Note: Reserve Component units should aggregate activity based on their monthly (rather than a weekly) schedule and published UTP.*

The degree of difficulty in planning training events varies. For example, preparations for conducting a class are significantly simpler than planning a FTX. More complex training events require more time to plan and coordinate.

Planners use the T-Week concept as a guide to assist in planning training activities that should occur in anticipation of each event. Each T-Week has an associated series of training activities that help guide planners and advise the commander of the actions the unit must accomplish to execute an effective training event.

The anchor point for the T-Week concept is the week training is executed. This is designated as T-Week. A minus sign (-) indicates the number of weeks prior to a particular training event execution. For example, T-5 is five weeks before the training event occurs. A plus sign (+) indicates the number of weeks following the event, for example, T+1 is one week after the training event. Units modify the T-Week concept to mirror their own local and command training requirements.

The rest of this appendix breaks down major T-Week activities. Units can use this appendix as a guide for developing their own training activities and training events. Although this appendix contains extensive descriptions, they do not account for an individual unit or installation's particular resource requirements for planning and coordination. Additionally, each major training event falls into its own T-week construct as various points on the long-range, mid-range, and short-range planning horizons.

UTP Publication to T-13: Identify Major Training Facilities

Even before the UTP is published during the planning process, trainers begin to identify the major training resources and facilities that a training event will require. As soon as leaders identify the need for certain training resources and facilities, trainers actively begin to secure these for training. Successful planners and trainers require extensive knowledge of the facilities available on the installation. The installation Directorate of Plans, Training, Mobilization and Security is the primary source for the commander and trainers. This directorate documents and manages locally available training resources and the manner to schedule their use. These resources fall under the Army training support system. (*Refer to AR 350-2.*)

Training Support Center Resources

An installation training support center is an organization that supplies training aids, devices, and facilities. Different installations offer different resources. A training support center may have the following resources available:

- Training land and training areas.
- Indirect firing points.
- Range facilities (to include multipurpose range complex, if available). Such facilities include range control facilities, processes, and may have certification requirements.
- Classroom facilities.
- LVC facilities.
- TADSS and TADSS warehouse.
- Medical Simulation Training Center.
- Flight simulators.
- Multiple Integrated Laser Engagement System (known as MILES) sets.
- Engagement Skills Training (known as EST) 2000.
- Improvised mock explosive training devices.
- Call for Fire Trainer (known as CFFT).

Early planning enables planners to schedule and lock in training facilities and resources for a unit. Depending on the installation, certain facilities are more heavily used than other facilities. Effective planners understand when and how to schedule such vital facilities. Once they schedule and reserve a facility for a unit, the commander ensures the unit occupies and uses the facility on the date and at the time scheduled. If planners or leaders cancel a training event, they do it as far in advance as possible so other units can schedule and use the facility.

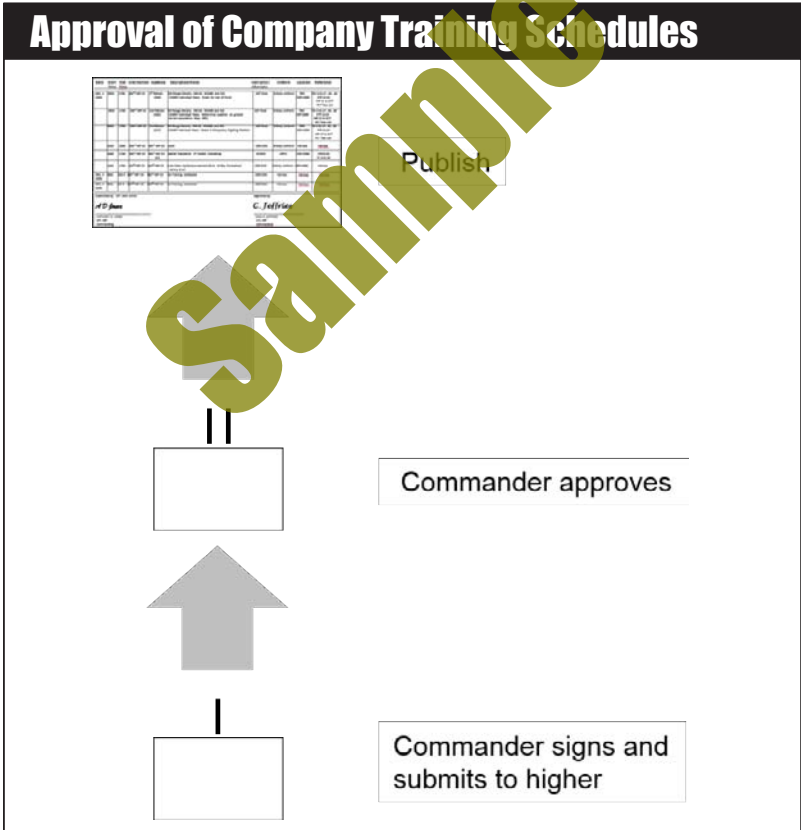
Installation Planning and Forecasting Tools

Most installations publish a local supplement to provide training support requests for local procedures, tools, and timelines. Some supplements provide links to common forecasting tools, requesting tools, and unique training resources, such as—

- Total Ammunition Management Information System (known as TAMIS).
- Range Facility Management Support System (known as RFMSS).

T-6: Lock In Training and Publish Training Schedules

At week T-6, commanders lock in training and publish training schedules. Failure to lock in training and adhere to published training schedules can ruin the unit's ability to execute effective training. The act of locking in training creates an atmosphere in which leaders and Soldiers at all levels build confidence in the unit's leaders to ensure training is predictable, protected, and supported by the chain of command. The message sent by such discipline is that training and leader development are unit priorities. Training schedules are focused and published at the company level. Unit commanders issue training schedules as a written order and use them as the primary means to communicate the scheduled training to Soldiers. Training schedules cite the collective or individual tasks to be trained. Training schedules are usually organized by or coincide with training weeks and cover a full week or more. Units publish training schedules T-6 week from training. Training schedules are signed by the unit commander and approved by the next higher commander (see figure H-5). For example, a company training schedule is signed by the company commander and approved by the battalion commander. The commander ensures that training schedules are conspicuously posted in the company area and electronically provides them directly to unit personnel as necessary.



Ref: FM 7-0 (Oct '16), fig. H-5. Approval of company training schedules.

IV. Training Briefings (TB and QTB/YTB)

Ref: FM 7-0, Train to Win in a Complex World (Oct '16), appendix G and p. 3-10; and ADRP 7-0, Training Units & Developing Leaders (Aug '12), chap. 3.

Commanders brief the plan to the next higher commander. This briefing formalizes the plan and the resources required to support it. The training briefing focuses exclusively on unit training and leader development planning; it does not cover other administrative matters. The training briefing is concise and focused. The training briefing is a contract between commanders. The unit commander agrees to train as described in the plan, and the higher commander approves the plan and agrees to provide resources to execute it. If the subordinate unit is deploying under another headquarters, the gaining commander or a representative participates in the briefing. The installation staff also participates in the briefing, since they manage the training support resources on the installation.

There are two types of training briefs (TBs). These are the TB and the QTB (Regular Army) or YTB (Reserve Component).

Training Briefs (TBs)

As described earlier, brigade and battalion commanders brief their UTP at the TB. The general format of a TB follows eleven basic slides:

- Brigade commander's training focus
- Operational environment
- Battalion training focus
- Battalion's commander training guidance
- Concept of operations: decisive operations
- Concept of operations: shaping operations #1 (individual training)
- Concept of operations: shaping operations #2 (leader development)
- Assessment plans
- Key resources required to train
- Training risks
- Training challenges

To begin a TB, a brigade commander discusses the brigade training focus and the training environment to which the brigade will train. All TB slides contain a title and bullet points. The figures in this section illustrate the details a user needs to add. Battalion commanders or command sergeants major follow the format of slides illustrated in figures G-3 through G-11 to complete the TB for their units. Commanders tailor the slides to meet their training requirements.

See p. 6-80 for sample training briefing (TB) slides.

Quarterly /Yearly Training Briefing

QTBs (for Regular Army) and YTBs (for Reserve Component) are periodic UTP updates to the commander two echelons above. These briefings support the TB that is briefed prior to the start of training.

See following pages (pp. 6-78 to 6-79) for sample QTB/YTB slides.

Quarterly/Yearly Training Briefing (QTB/YTB)

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. G-4 to G-8.

The QTB (for Regular Army) and the YTB (for Reserve Component) are periodic conferences on training between battalion commanders and division commanders. These TBs directly support the UTP. QTBs and YTBs are integral to the mid-range planning for training.

This discussion illustrates briefing slides for presenting QTBs and YTBs. The exact format and content will vary from command to command based on the commander's guidance and preference. Users can download slides for TBs slides from ATN. Staffs post the brigade and battalion UTP calendars in the meeting room for commanders to use as a reference throughout the briefing.

These TBs focus on reporting the overall progress of the UTP, identifying issues related to execution of the UTP, and ensuring the UTP as published is on track. The briefing gives battalion commanders a venue to discuss training previously conducted, training being conducted, and training planned for the future. These briefings can also be the venue for proposing and approving potential changes to the UTP as necessary. If changes are necessary, the base UTP OPORD requires a FRAGORD once the higher commander approves the modification.

Similar to the TB, the brigade commander provides the brigade training overview, and battalion commanders and command sergeants major brief the current status of UTP progress. Battalion commanders in separate brigades and regiments present the QTB to corps major subordinate commanders. The YTB for Reserve Component units is normally presented to the next higher commander. The YTB is conducted prior to the start of the fiscal year in Reserve Component units. Separate Reserve Component battalion commanders and company commanders may also brief the next higher commander. Some Reserve Component units may not be able to conduct in-person briefings. Ideally, installation training resource conferences should occur just prior to the QTBs or YTB to provide the most current and accurate information relating to the installation training resources and facility scheduling.

Sample QTB/YTB Slides

Brigade Commander Training Focus

- State the higher commander's training focus as stated in the unit training plan.
- Include who, what, when, where, and why. The 'what' includes the METs the higher unit will train on during the planning horizon.

MET mission-essential task

Figure G-12. Sample slide for brigade training focus

Operational Environment

- Write a concise statement describing an operational environment the unit will train for (*train as you fight*).
- Break the statement down by operational variables—political, military, economic, social, information, infrastructure, physical environment, and time.

Figure G-13. Sample slide for training environment

Battalion Training Focus

- State the unit's training focus from the UTP.
- Answer who, what, when, where, and why. The 'what' includes the METs the unit will train on during the planning horizon to support the higher unit. If no mission is assigned, this should be the prioritized METL the unit will train.

MET mission-essential task
METL mission-essential task list
UTP unit training plan

Figure G-14. Sample slide for battalion training focus

Battalion MET Assessments

- List the unit METL (and METL for assigned missions if applicable). Include subordinate unit METs assessments.
- Indicate the current assessments of the METs selected to train. This helps frame the training strategy to improve and sustain proficiencies.

MET mission-essential task
METL mission-essential task list

Figure G-15. Sample slide for battalion assessments

Conducting Training

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), chap 3 and ADRP 7-0, *Training Units & Developing Leaders* (Aug '12), chap 3.

Conducting training events encompasses all activities related to planning for, preparing for, executing, and assessing the training events that comprise the UTP. Commanders plan and coordinate training events in detail well before execution to synchronize METs and training objectives and to resource each event properly. Commanders use training meetings as the primary forum to ensure that coordination and planning for training events are on track.

Conducting Training



PLAN for Training



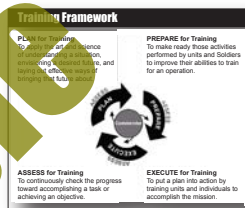
PREPARE for Training



EXECUTE for Training



ASSESS for Training



*Training Framework,
see p. 7-3.*

All successful training requires resources coordination, rehearsals, and precombat checks before training. Effective training requires time locked in on the UTP calendar for units and individuals to retrain tasks as training occurs. If the unit fails to meet the training objectives for a specific training event, the unit allocates time to ensure that it can retrain the tasks before the event is concluded. A unit must be proficient in a failed task before it advances to more complex collective tasks.

For discussion of PLAN for Training, see pp. 7-9 to 7-12.

For discussion of PREPARE Training, see pp. 7-13 to 7-16.

For discussion of EXECUTE Training, see pp. 7-17 to 7-18.

For discussion of ASSESS for Training, see pp. 8-1 to 8-6.

Where to Start

The UTP identifies the multiechelon training events crucial to attaining task proficiency. It is the starting point for leaders to begin to assign planning responsibility and begin the process of determining and coordinating resources. It focuses on the multiechelon training events that train the METs such as a staff training exercise (known as STAFFEX), command post exercise, live fire exercise (known as LFX), or FTX. These training events require substantial resources, coordination, and facilities.

Once multiechelon training events are accounted for and included in the UTP calendar, the unit adds other events like unit-conducted classes, mandatory training, and those training events supported by internal unit-provided resources and coordination for unit-wide visibility and action.

See pp. 7-19 to 7-32 for discussion of lane training exercises and pp. 7-33 to 7-37 for discussion of other types of training exercises.

Once leaders disseminate the UTP OPORD to subordinates, execution of the training plan begins. Leaders adapt to changes, as necessary. Thorough preparation to conduct training is essential. Assessment of unit and individual performance is a continual process. While units execute one event, they plan and prepare another. Plan, prepare, execute, and assess are not performed sequentially, but overlap in a series of dynamic and interrelated processes throughout the life cycle of the UTP until the unit attains the commander's visualized end state for training. Training meetings facilitate this integrated process by assessing the collective tasks trained during UTP execution, as well as coordinating resources and planning for future events.

Leaders must plan, prepare, execute, and assess each training event that supports the UTP. Training meetings and recovery after training are key activities that occur as each training event is conducted. These activities ensure that units execute the UTP and it meets the commander's desired objectives for unit training and leader development.

Training execution occurs at all echelons, from a unified action training exercise to a first-line leader conducting individual training. Ideally, leaders execute training using the crawl-walk-run approach—as appropriate and tailored to the individual's, team's, or unit's needs and capabilities—to build confidence over time and emphasize fundamentals and standards. Effective training execution, regardless of the specific collective, leader, and individual tasks being executed, requires adequate preparation, effective presentation and practice, and thorough evaluation. After training is executed, leaders ensure individuals recover from training and review successes and challenges to apply observations, insights, and lessons to future training and operations.

Sample

I. Training Framework

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), p. 3-1.

Unit leaders use the basic **Army operations process** as the training framework for conducting each training event that comprises the UTP.

Planning for training events does not significantly differ from planning for an operation. A commander's presence sends a message to Soldiers that training is crucial to unit success. It allows the commander to observe and assess the conduct of training, training effectiveness, resource utilization, leaders in action, the state of readiness, and individual morale. It also serves to strengthen mutual trust—trust between the leader and subordinates—that is integral to the chain of command.

Preparing for operations (and training) under the philosophy of mission command requires trust up and down the chain of command and between individuals and units.

Execution of training occurs with the resources available. Without the right resources available at the right time, meaningful and effective training will not occur and units will lose valuable, irreplaceable training time.

The **assessment** of tasks and leader proficiency is a constant process as units plan and train. Evaluations of task performance and bottom-up feedback are key because they provide the commander the information necessary to make accurate and timely MET assessments.

Training Framework

PLAN for Training

To apply the art and science of understanding a situation, envisioning a desired future, and laying out effective ways of bringing that future about.

PREPARE for Training

To make ready those activities performed by units and Soldiers to improve their abilities to train for an operation.



ASSESS for Training

To continuously check the progress toward accomplishing a task or achieving an objective.

EXECUTE for Training

To put a plan into action by training units and individuals to accomplish the mission.

For discussion of **PLAN for Training**, see pp. 7-9 to 7-12.

For discussion of **PREPARE Training**, see pp. 7-13 to 7-16.

For discussion of **EXECUTE Training**, see pp. 7-17 to 7-18.

For discussion of **ASSESS for Training**, see pp. 8-1 to 8-6.

I. PLAN for Training

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. 3-2 to 3-5.

Following the operations process framework, the leader assigned as the primary planner for the training event reviews the initial training objectives for the event from the UTP. Following this review, the planner completes a mission analysis and confers with the commander for additional training guidance. Based on this discussion, the planner refines training objectives with additional details based on the guidance from the commander. (See the Event Details page found at the CATS Web site for major resources to assist the planner in mission analysis.) The planner uses T&EOs to identify other supporting collective and individual tasks that support higher collective tasks. Once planners identify these tasks, they determine all prerequisite tasks on which the unit must train prior to executing the event. CATSs help identify training gates for the event being planned.



Ref: FM 7-0 (Oct '16), fig. 3-1. *Plan phase of the operations process.*

Planners evaluate an operational environment to consider how to replicate it in the training environment. The higher commander's CTG identifies a potential environment to replicate in the training environment, including role players, type of visibility, types of terrain, and enemy forces. Using the objective task evaluation criteria matrix in the T&EO, planners identify the complexity of the training environment based on the commander's desired end state for task proficiency at the end of the training event.

See discussion of the objective task evaluation criteria matrix in the T&EO on pp. 8-7 to 8-10.

II. 8-Step Training Model

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. 3-3 to 3-5.

At the company and platoon levels, training models are developed and used as a simple and effective planning and execution tool for small-unit, individual training events. Training models do not provide a sufficient level of detail from which to develop a UTP, to fully develop training events, or to coordinate training events. Instead, they serve as a useful tool for subordinate leaders to ensure major activities and steps are accomplished. Training models help manage training events that are not complex in planning or execution. Units modify training models in the number of steps and procedures based on experience and the efficiencies gained by their use. One training model is the 8-step training model (below). The 8-step training model provides a flexible and reliable vehicle for creating continuity for planning and managing simple training events.

8-Step Training Model



Ref: FM 7-0 (Oct '16), fig. 3-2. *The 8-step training model.*

Step 1 – Plan the Training Event

During step 1, leaders develop specific, obtainable, and measurable training objectives for the upcoming event based on guidance from the commander. Leaders allocate and ensure that there is adequate time scheduled for the event and it is indicated on the unit's training schedule. They create scenarios and instructions to support the training objectives. Leaders identify required resources, including necessary training areas and possible trainers. They identify hazards and eliminate or mitigate associated risks. Lastly, leaders develop training support and assessment plans, thereby establishing the groundwork for high-quality training.

Step 2 – Train and Certify Leaders

Step 2 involves training and certifying leaders. Leaders consist of officers, NCOs, civilians, and Soldiers. Qualified leaders train and certify other leaders. Qualified personnel are knowledgeable of the training subject matter and have performed the task themselves

II. Lane Training Uses

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), p. E-2.

The purpose of lane training is to build or sustain proficiency in Soldier and leader individual tasks, collective tasks, and battle drills. Lane training enables leaders to—

- Conduct initial, developmental, sustainment, refresher, and enhancement training and assessment for tactical and technical tasks.
- Train similar units—simultaneously or sequentially—using mission-related scenarios.
- Test, standardize, and train TTP.
- Develop and refine unit SOPs that support unit METs.
- Efficiently control training objectives (including tasks, conditions, standards, and training proficiencies) during training.
- Support initial training and retraining.
- Vary training conditions to the training level of the unit (which may be at the initial, refresher, or sustainment level).
- Integrate (both vertically and horizontally) specific task training, battle drills, and exercises from different functional areas (including maneuver, maneuver support, and sustainment) into unit training programs.
- Achieve proficiency on multiechelon, multi-unit, combined, joint, multinational, or interagency procedures and on other difficult, infrequent, or teamwork-based tasks.
- Achieve maximum results when training Soldiers and units while efficiently leveraging limited resources (including land, facilities, personnel, and equipment).
- Prepare for both formal/informal assessments, internal evaluations, and EXEVALs.
- Conduct competitions.

In certain instances, lane training may be the most efficient and effective means to train small units to attain and sustain selected task proficiencies. Lane training techniques may be indicated as a training method—

- When training assessments indicate there may be changes or performance deficiencies in team, squad, section, platoon, or company collective tasks. Potential situations or indicators include changes in—
 - Doctrine.
 - Organization.
 - Materiel.
 - Personnel.
 - Training.
 - Leader development.
 - Task performance.
- When units need to prepare for assigned missions or specific operational environments.
- When leaders units need to prepare Soldiers and units for major training events, including annual training, gunnery exercises, combat training center rotations, and EXEVALs.
- When sustainment training is needed.
- When task proficiency is perishable or easily atrophied.
- When there is a need to evaluate performance on collective and supporting individual tasks further.
- When there is a need for integrated multiechelon or multifunctional training.
- When training requires significant planning, management, or resource support.
- When the use of other training techniques proves more expensive or impractical.
- When directed by higher headquarters.

III. Lane Training Characteristics

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. E-3 to E-4.

Lane training is a process for training company-size and smaller units on collective tasks that support a unit's capability or mission. The process consists of planning, execution, and assessment phases. In the planning phase, lane training emphasizes pre-exercise—

- Certification of trainers and leaders.
- Validation of training plans and materials.
- Rehearsals.

Characteristics	Description
Small-unit focus	A focus by units of platoon size or below (including staffs and small groups) on training a unit of company size or below.
Disciplined scenario	A disciplined scenario concentrating on mission-focused tasks and providing structured stimuli to prompt friendly force behavior.
Battle-focus	A focus on a limited number of collective tasks for each lane training exercise to improve effectiveness.
Validated tasks	Doctrinally and technically correct tasks and training objectives that have been validated against current doctrine and Army standards.
Controlled tasks and events	Highly controlled tasks, countertasks, and events that are structured to provide specific stimuli and elicit specific responses from the unit being trained.
Trained OC/Ts	OC/Ts trained and verified on specific OC/T and LTX tasks.
Trained OPFOR	Forces trained and verified on specific OPFOR countertasks required in the LTX in appropriate force ratios.
Support from outside the unit trained	Support (including OC/Ts, OPFOR, and resources) provided from sources other than the unit being trained.
LTX	A training exercise using lane training principles and techniques.
LTX	lane training exercise OC/T observer-controller/trainer OPFOR opposing force

Ref: FM 7-0 (Oct '16), table E-1. *Characteristics of lane training.*

The execution phase (the LTX) focuses on specific collective tasks. Historically, lane training has usually been associated with tasks requiring movement over terrain (for example, conduct a movement to contact or conduct an attack); however, movement is not required. Lane training is appropriate for most small-unit maneuver, maneuver support, and sustainment collective tasks requiring teamwork and practice, whether conducted in fixed facilities or in a field environment.

Lane training is performance-oriented training. Since performance-oriented training requires training to the task performance standard, an inherent element is performance evaluation. This evaluation focuses on verification (or certification) that Soldiers, leaders, and units can perform tasks under specified conditions and standards. Effective lane training requires replication of missions and operational environments. Although lane training can be conducted in a live, virtual, or constructive training environment, it is normally conducted in a live environment (conducted in the field or duty site environment). However, the use of virtual or constructive environments to prepare for or to conduct lane training can dramatically enhance the effectiveness of lane training in live environments.

To ensure standardization, units develop LTXs to teach the doctrinally preferred way to perform specific missions or tasks. Initially, LTXs focus on a task or a few tasks at one time and exclude related tasks that may distract Soldiers from learning. However, once a unit is proficient in the tasks trained, more tasks may be included in more comprehensive LTXs to increase realism.

An LTX can consist of multiple lanes training the same task, but with different and varying conditions. LTXs are more flexible than drills, and units can tailor LTXs to meet a unit's METs or assigned mission requirements.

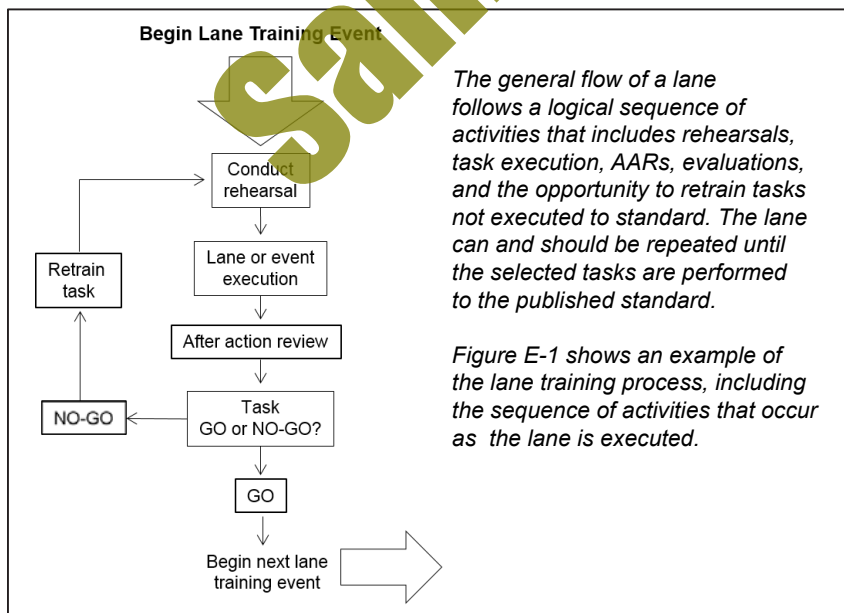
Lane training has characteristics that make it significantly different from other forms of training. Unit leaders consider these characteristics before planning and executing LTXs.

Leaders need an understanding of the tasks to be trained so they can develop a quality LTX. Leaders prepare themselves and their units. They coordinate training supplies and equipment well in advance of the LTX. Detailed and meticulous planning is critical in making an LTX that meets the training objectives.

Leaders conduct several activities prior to conducting an LTX. Trainers institute a pre-LTX training program to develop and verify the unit leaders' task proficiency. In this case, a pre-LTX training program means before the exercise or prior to arrival of the unit at the LTX area. Next, leaders institute a pre-LTX unit training and verification period after the leader training period. During this period, the unit's subordinate elements and personnel develop proficiency (through training and rehearsal) on prerequisite Soldier, leader, and collective tasks and battle drills.

After leaders and units develop proficiency on prerequisite tasks, they are ready to conduct LTX rehearsals. OC/Ts, OPFOR elements, leaders, and units all conduct rehearsals prior to the exercise. Leaders and units conduct rehearsals in the LTX area (in the assembly area or rehearsal area) just prior to lane execution. Rehearsals enable trainers to perform a pre-LTX validation, which is a tentative validation of training plans and materials prior to the exercise.

Prior to conducting an LTX, trainers coordinate for post-LTX activities, including AARs, evaluations, retraining, and validation. For example, OC/Ts and unit leaders conduct AARs immediately following lane execution to provide feedback to units. AARs are facilitated by OC/Ts, are supported by the unit's leaders and OPFOR, and involve all unit participants. Post-LTX, senior unit leaders conduct a task performance evaluation. This evaluation determines whether units performed tasks to standard or not. The senior OC/T coordinates with the leader of the unit being trained. After an LTX, some units may require retraining. A retraining opportunity is an opportunity after the AAR to conduct retraining until a unit achieves standards. After retraining, the unit should have an opportunity to attempt the same tasks on a different lane, possibly with additional tasks, different conditions, or different leaders. Additionally, OC/Ts and unit leaders perform a validation of training and training materials after each iteration of the LTX.



Ref: FM 7-0 (Oct '16), fig. E-1. General sequence of activities during a lane training event.

V. Training Exercises

Ref: Adapted from previous references (FM 7-1 and FM 25-101, app. C).

Training Exercises

- 1** Map Exercise (MAPEX)
- 2** Tactical Exercise Without Troops (TEWT)
- 3** Fire Coordination Exercise (FCX)
- 4** Command Post Exercise (CPX)
- 5** Situational Training Exercise (STX)
- 6** Command Field Exercise (CFX)
- 7** Logistical Coordination Exercise (LCX)
- 8** Field Training Exercise (FTX)
- 9** Live Fire Exercise (LFX)

Commanders select a particular training exercise or combination of exercises based on specific training objectives and on available resources. When selecting exercises, commanders must consider several key questions:

- Who will be trained (soldiers, leaders, or units)?
- What are the training objectives?
- Which, if any, of the training exercises are most suitable to accomplish each objective?
- What are the available resources (time, training areas, equipment, money)?
- Which of the training exercises or combination will help meet the training objectives within the available training resources?

ASSESS for Training

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. 3-7 to 3-14 and ADRP 7-0, *Training Units & Developing Leaders* (Aug '12), pp. 3-11 to 3-12.

Leaders assess training by continuously checking progress toward task achievement or training objectives. Training events provide the venue for commanders and leaders to evaluate and measure the effectiveness of the collective tasks selected to train. The training objectives—determined and published by the commander for each training event—communicate the task, condition, standard, and expected training proficiencies for the collective tasks selected.

IV. ASSESS for Training

PLAN for Training

To apply the art and science of understanding a situation, envisioning a desired future, and laying out effective ways of bringing that future about.

PREPARE for Training

To make ready those activities performed by units and Soldiers to improve their abilities to train for an operation.

ASSESS for Training

To continuously check the progress toward accomplishing a task or achieving an objective.

EXECUTE for Training

To put a plan into action by training units and individuals to accomplish the mission.



Ref: FM 7-0 (Oct '16), fig. 3-5. *Assess phase of the operations process.*

Leaders use the assessment plan developed during preparation to evaluate unit performance. During execution, leaders use T&EOs to record a unit's performance every time it attempts a collective task. Evaluators—using the objective task evaluation criteria matrix on the T&EO—objectively record the proficiencies noted as the unit completes tasks. At the training meeting following the training event, evaluations are aggregated bottom-up, so the commander can assess whether the unit met the training objectives. The training meeting occurs the week following the start of training (T+1 per the T-Week concept). Using the training proficiency ratings, the commander completes the assessments and subsequently records them into DTMS. Training meetings conducted routinely by echelon are critical to the assessment process.

See p. 5-3 for discussion of training proficiency ratings.

Assessment Considerations

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. 3-10 to 3-14.

When assessing training, commanders consider:

- Their own observations and those of subordinate leaders and other individuals
- Feedback from after action reviews
- Results of unit evaluations

An assessment is determination of the progress toward accomplishing a task, creating a condition, or achieving an objective (JP 3-0). Commanders determine training readiness using evaluations and assessments. Evaluations are based on the performance of tasks measured against an established standard under set conditions. Evaluations are recorded using T&EOs for collective and individual tasks. Users access T&EOs on ATN, CATS, DTMS, and the CAR. These Web sites are the Army's only sources that provide the prescribed training tasks, conditions, and standards for all Army individual and collective tasks.

See p. 5-3 for discussion of training proficiency ratings.

Objective Considerations

To enable unit leaders and commanders to evaluate proficiency of collective tasks objectively, they use established task proficiency criteria and standards. Task proficiency criteria and standards differentiate the level of training a unit has achieved using the proficiency ratings. See the discussion beginning in paragraph 1-5 for Army task rating proficiency standards.

Evaluations of task performance steps—documented within a task performance measure of the task T&EO—are objective evaluation ratings assigned directly to demonstrated task proficiency. Evaluators observe performance of the tasks measures and grade the performance steps either as GO or as NO-GO.

Evaluators use the objective task evaluation criteria matrix found on every collective T&EO to help evaluate performance of collective tasks (see figure 3-7). By considering certain execution criteria—like the training environment and day or night conditions—the evaluator or unit commander can record a more accurate and objective evaluation of task performance. An accurate and objective evaluation yields a more objective assessment of task performance. See appendix B for details on objective task evaluation criteria matrixes and specific T&EO completion instructions. Evaluators for the Organizational Inspection Program also complete checklists. See appendix I for potential questions.

Subjective Considerations

While the T&EO and task proficiency standards provide objective criteria for determining task proficiency, assessments allow leaders to take into account the subjective nature of training. Leaders' assessments combine their professional observations with other information to develop an overall assessment of the unit's ability to accomplish its mission. Final authority of a unit's assessment lies solely with the commander. Commanders and leaders might consider the following information in their assessments:

- Assessment and feedback from higher.
- AARs.
- Subordinate leader and Soldier feedback.
- Evaluator and OC/T comments.
- Personal experience and observations.

Plan and Prepare				Execute							Assess	
Operational Environment				Training Environment (L/V/C)	% Leaders present at training/authorized	% Present at training/authorized	External evaluation	Performance measures	Critical performance measures	Leader performance measures	Task assessment	
SQD and PLT	CO and BN	BDE and above										
Dynamic (single threat)	Dynamic and complex (4 + OE variables and hybrid threat)	Dynamic and complex (all OE variables and hybrid threat)	Night	Proponent establishes training environment standards	≥85%	≥80%	Yes	≥90% GO	All	≥90%	T	
					75-84%			80-90% GO		80-89%	T-	
Static (single threat)	Dynamic (single threat)	Dynamic and complex (all OE variables and single threat)	65-74%		75-79%		65-79% GO		P			
			60-64%		60-74%	No	51-64% GO		P-			
	Static (single threat)	Dynamic & complex (< all OE variables and single threat)			<60%	<60%		<51% GO	<All	<80%	U	
BDE	brigade	OE			operational environment				T		fully trained	
BN	battalion	P			practiced				T-		trained	
C	constructive	E		marginally practiced				U		untrained		
CO	company	PLT		platoon				V		virtual		
L	live	SQD		squad								
Note: The percentages used in this figure are for illustration only. See the collective task's published training and evaluation outline for the applicable percentages.												

Ref: FM 7-0 (Oct '16), fig. 3-7. Objective task evaluation criteria.

Assessments provide a final graded determination on an individual's, a leader's, or a unit's ability to perform a task to the published standard.

At the individual level, leaders observe Soldier task performance. They record the results of this performance using individual task T&EOs. Leaders also use the results of these assessments to counsel Soldiers to sustain or improve task performance.

In the assessment of leaders, commanders consider subordinate leaders' proficiency. An effective commander deliberately observes and assesses subordinate leaders. The commander pays particular attention to assessing the character, competence, and commitment of subordinate leaders.

At the unit level, leaders analyze and correlate observations and evaluations of observed unit performance. The resulting assessment is based on an aggregate of these many inputs. From company level and higher, these unit assessments form the basis of recording unit training readiness, which contributes to a unit status reporting.

Performance Steps

Performance steps are the major actions a unit must accomplish to perform a collective task to standard. Performance steps provide a sequential, step-by-step description of the discrete actions that compose a task. The steps are broken into plan steps, prepare steps, and execute steps. In each of these groups, the steps are numbered and in sequential order. A unit must perform each step. Some steps have no sub steps, and other steps have multiple sub steps. For instance in figure B-4, performance step #6 is "+The company commander issues an OPORD. Ensures that subordinates, attachments (as applicable), and staff section representative(s) are present for the OPORD issuance." The performance step falls under the plan portion (not shown). In this example, step #6 has no sub steps but is a critical step (shown with the plus sign). Under the prepare step, step #8 reads "**Company leaders prepare for command post operations in coordination with the higher headquarters." This step has several sub steps and is conducted by a leader (shown with the asterisk). Each numbered performance step becomes a performance measure.

6. +The company commander issues an OPORD. Ensures that subordinates, attachments (as applicable), and staff section representative(s) are present for the OPORD issuance.

7. *The company commander conducts confirmation briefs with subordinates, attachments (as applicable), and staff section representative(s) immediately after the OPORD is issued to ensure they understand the commander's intent, specific tasks, concept of the operation, and the relationship between their mission and the other units in the operation.

PREPARE

8. *Company leaders prepare for command post operations in coordination with the higher headquarters.

- a. Conducts pre-combat checks and inspections.
- b. Conducts rehearsals that include addressing the following actions:
 - (1) CP setup and organization.
 - (2) Actions on enemy contact.
 - (3) Battle drills.
 - (4) Formations and movement of units.
 - (5) Casualty evacuation (CASEVAC).
- c. Cross trains personnel based on training constraints as required.
- d. Issues supplementary orders (RAOs/RDs) as necessary to address changes to the plan identified during reconnaissance, higher headquarters' guidance, and higher headquarters' combined arms rehearsal.

EXECUTE

9. The company conducts tactical movement from the start point (SP) or line of departure (LD) to the vicinity of the planned CP location(s) in coordination with the higher headquarters and the mission scheme of maneuver.

10. *Company leaders, including the quartering party, conduct a leader's reconnaissance.

- a. Pinpoints the primary and alternate CP locations.

Ref: FM 7-0 (Oct '16), fig. B-4. Sample extract from T&EO illustrating performance steps.

Performance Measures

Performance measures are actions that are objectively observable, qualitative, and quantitative. Critical steps (or leader steps) are notated with a plus sign or an asterisk respectively. Evaluators and leaders use performance measures to determine if a unit satisfactorily achieves a performance step or sub step. Evaluators rate a unit's performance as GO, NO-GO, or N/A (for not applicable) measure (see figure B-5). If the performance step of a task was performed to standard, a GO is assessed for the associated performance measure. If a particular performance step in the task was not performed to standard, a NO-GO is assessed. If the measure does not apply at a particular echelon or is not observed during training of a particular unit, the evaluator can designate this in the N/A column so as not to affect the GO or NO-GO status of the unit.

PERFORMANCE MEASURES		GO	NO-GO	N/A
1. The company gained and/or maintained situational understanding.		✓X		
2. +The company commander received the mission requiring operation of a command post and began execution of troop leading procedures.		✓X		
3. * The company commander issued the warning order (WARNORD).		✓X		
4. *The company commander coordinated with higher headquarters.		X	✓	
5. +The company commander conducted mission analysis focusing on the directed mission, enemy forces and their capabilities, terrain and weather effects, troops available, time available to execute the operation, and civil considerations (METT-TC) and developed a tentative plan.		X	✓	
6. +The company commander issued an OPORD.		X	✓	
7. *The company commander conducted confirmation briefs with subordinate immediately after the OPORD was issued to ensure subordinates understood commander's intent, specific tasks, concept of the operation, and the relationships between their mission and the other units in the operation.		✓X		
8. * Company leaders prepared for command post operations.		✓X		
9. The company conducted tactical movement from the staging point (SP) to the departure (LD) to the vicinity of the planned CP location (s).		X	✓	
10. *Company leaders, including the quartermaster, conducted a leader's reconnaissance.			✓	X
11. *The company commander designed and tentatively positioned the CP.		✓X		
12. +The company established security and conducted operations.		✓X		
13. * The company commander designed and tentatively positioned the CP.		✓X		
14. The company established security and conducted operations.		X	✓	

TASK PERFORMANCE / EVALUATION SUMMARY BLOCK							
ITERATION	1	2	3	4	5	M	TOTAL
TOTAL PERFORMANCE MEASURES EVALUATED	14	14					28
TOTAL PERFORMANCE MEASURES GO	8	13					21
TRAINING STATUS GO/NO-GO	NO-GO	GO					

ITERATION:	1	2	3	4	5	M
COMMANDER/LEADER ASSESSMENT:	T	1	P	P	U	

FRAGORD	fragmentary order	HQ	headquarters
M	mission-oriented protective posture	OPORD	operations order
P	practiced	P	marginally practiced
T	fully trained	TC	trained
U	untrained		

Ref: FM 7-0 (Oct 16), fig. B-5. Sample extract from T&EO illustrating performance measures.

Task Performance and Evaluation Summary Block

This block provides the evaluator a means of recording GO and NO-GO observed performances based on the iterations conducted (times the task was attempted). In the T&EO, the task performance and evaluation block provides a table of spaces that evaluators use to total the number performance measures evaluated, total the number of performance measures that scored a GO, and total the number of units with a GO or NO-GO training status. In figure B-5, the unit evaluated conducted 2 iterations of this particular task. The evaluator recorded a total of 28 performance measures observed, 21 of these recorded as GO. Only the recorded performance for the final iteration is carried over to the objective task evaluation criteria matrix (see figure B-3). In this example, the performance recorded in the final iteration was 12 of 14 measures recorded as a GO. The resulting percentage of 85% is circled in the corresponding percentage block of the performance measures column of the objective task evaluation criteria matrix.

Iteration

This block provides a space for the evaluator to record the number of iterations (task attempts) the unit being observed performs. The 'M' column records an iteration performed while the unit was in mission-oriented protective posture (MOPP).

Agenda for a Training AAR

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), p. D-3.

AARs conducted during training follow the same agenda as AARs conducted during operations:

- Review what was supposed to happen.
- Establish what happened.
- Determine what was right or wrong with what happened.
- Determine how to perform the task differently next time.

A training AAR begins with a review of what was supposed to happen. A facilitator (sometimes called an evaluator), along with participants, reviews what was supposed to happen. This review is based on the commander's guidance, training objectives, and tasks to train. An OPOD or the training schedule typically contains information that states what was supposed to happen. This information is repeated in the training plan. The facilitator also reviews the UTP, training objectives, applicable individual training records, and T&EOs. Ideally, the leader of the evaluated unit conducts the AAR with assistance from an evaluator or OC/T.

The training AAR continues as the evaluator establishes what happened. The facilitator and participants determine what actually occurred during the training event, phase, or operation. The leader attempts to gather as many views or perspectives—such as from the OPFOR, squad leader, team leader, or rifleman—as feasible. These views help to establish a common understanding of the operation or event. Leaders then understand the complexity of an event and work to solve complex, ill-defined problems quickly. An effective AAR requires an accurate account of events. The evaluator and participants determine what actually happened during performance of the task. The discussion that follows is only as good as the accuracy of the events. For force-on-force training, OPFOR members assist in describing the flow of the training event and both the evaluated unit and OPFOR discuss training outcomes from their respective points of view.

After establishing the events, the AAR covers what was right or wrong with what happened. Participants identify the strong and weak points of their performances based on the commander's guidance and performance measures. The facilitator guides discussions to ensure maximum input that is operationally sound and relevant to the training event. Effectively guided discussions reach conclusions that are doctrinally sound, consistent with Army standards, and relevant to the unit mission. Participants and evaluators assess and candidly discuss what happened in terms of whether actions and decisions were ethical, effective, and efficient.

A training AAR concludes as the participants determine how the unit should complete the task differently next time. The facilitator guides the unit in self-determining how it might perform the task more effectively in the future. The unit identifies problems and provides solutions as well as identifies who is responsible for making the recommended changes. Additionally, the facilitator guides the discussion to determine a more effective way to train the tasks to achieve the commander's guidance. The evaluator or OC/T assists the chain of command undergoing the training to lead the group in determining exactly how participants will perform differently the next time the unit attempts the task. Ideally, this assistance motivates units and Soldiers to conduct future sustainment training to standard.

Step 1. PLAN the After Action Review

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), pp. D-3 to D-5.

Effective AARs, formal or informal, require leaders to plan, prepare for, execute, and assess. AAR planning is part of each training event. Successful training leaders understand the unit's mission and the commander's guidance for the training event. During planning, commanders identify opportunities to conduct AARs, assign OC/T responsibilities, and lock in allocated time and resources to conduct AARs. As leaders conduct training, subordinate leaders assess unit and leader proficiency on collective and individual tasks, conduct on-the-spot coaching, and lead informal AARs. These tasks require that leaders understand the commander's guidance, concept of operations, and tasks to be trained during a training event.

The amount and level of detail needed during the planning and preparation processes depend on the type of AAR to be conducted and available resources. The AAR process has four steps:

- Plan.
- Prepare.
- Execute.
- Assess.

STEP 1: PLAN the After Action Review

The AAR plan provides the foundation for successful AARs. Commanders provide their guidance to develop an AAR plan for each training event. Subordinates then determine how to achieve the commander's guidance. The guidance applies to formal and informal AARs and identifies—

- Who will conduct the AAR.
- Who will provide information.
- Aspects of the operation an AAR evaluates.
- Who will attend the AAR.
- When and where the AAR occurs.

Leaders or OC/Ts use the AAR plan to identify critical places and events to observe to provide the unit a timely and valid assessment. Critical places can include unit maintenance collection points, passage points, and unit aid stations. The AAR plan identifies responsible persons who (either internal or external to the unit) facilitate the AAR for a particular event. The leader or OC/T is the individual tasked to observe training, provide control for the training, and lead the AAR.

Selecting and Training Observer-Controllers/Trainers

When planning an AAR, commanders select leaders and OC/Ts—

- Who demonstrate proficiency in the tasks to be trained.
- With knowledge of the duties they are to observe.
- With knowledge of current doctrine and TTP.

When using external OC/Ts, ideally they are at least equal in rank to the leader of the unit they will assess. If commanders must choose between experience and an understanding of current TTP or rank, they should go with experience. A staff sergeant with experience as a tank platoon sergeant is a better platoon OC/T than a sergeant first class who has no platoon sergeant experience. Commanders are responsible for training and certifying OC/Ts to include providing training on how to conduct an AAR. Ideally, inexperienced OC/Ts should observe properly conducted AARs before acting as an OC/T.

III. (OIP) Organizational Inspection Program

Ref: FM 7-0, *Train to Win in a Complex World* (Oct '16), appendix I.

Unit training is a subset of the unit's overall Organizational Inspection Program (known as OIP). This section provides a training management inspector with the basic overarching program and then focuses on the specifics for training management. Refer to AR 1-201 for details on inspections.

Guidance For Inspectors

All inspections have a major purpose: to provide feedback to commanders so they can make decisions that will improve the Army. Inspections focus on measuring compliance against established standards to ensure that the Army as a whole can function effectively in its combat role. The five principles of Army inspections support the five basic elements of an inspection. Those five elements are—

- Measure performance against a standard.
- Determine the magnitude of the problem.
- Seek the root cause of the problem.
- Determine a solution.
- Assign responsibility to the appropriate individuals or agencies.

Checklist Structure

Section I provides an inspector with a checklist for identifying training management processes in the unit. The presence of these processes imply that the unit has an understanding of the doctrine and contains the parts essential for planning, preparing, executing, and assessing unit training.

Section II focuses on evaluating the indicators of an effective training management program. It provides indicators of specific inspection items that allow for a more detailed assessment. The second section may require multiple observations of training planning, preparation, and execution to provide an accurate review of the unit's training program effectiveness.

Section I –Brigade, Battalion, and Company Inspection Checklist

This series of questions measures the unit's training. These questions enable an inspector to determine if the foundations of effective unit training exist. The series of questions is not an indicator of unit training effectiveness. The key to any training program is the commander's personal involvement. As the unit's primary trainer, the commander has direct involvement in the planning, preparation, execution, and assessment of training proficiencies and ensures compliance with the commander's vision and guidance for training. Ideally, a unit conducts annual formal inspections with semiannual internal informal inspections.

As a staff completes the checklist, it aims to answer each question in the affirmative (YES). If the staff cannot answer in the affirmative, it adds notes or comments to the checklist. Often those items require retraining.

Task

As staffs check each item in the checklist, they note if the unit sustains or improves the task and add a comment to elaborate.

Unit Training Plan

The UTP ensures units plan and prepare for training. Inspectors ask the following questions pertaining to the UTP:

- Is the higher headquarters UTP available and posted in DTMS?
- Is the inspected unit's UTP published? Is it posted to DTMS?
- Does the UTP contain the higher headquarters mission?
- Does the UTP contain the higher headquarters METL?
- Does the UTP contain the higher headquarters commander's training guidance?
- Does the UTP contain the unit mission?
- Does the UTP contain the commander's guidance?
- Does the UTP contain a concept of operations that includes—
 - A collective training plan?
 - An individual training plan in support of the collective training plan?
 - A leader development plan?
- Does the UTP contain a time management cycle?
- Does the UTP contain tasks to subordinate units?
- Does the UTP contain an assessment plan?
- Does the UTP contain the training environment?
- Does the UTP contain resources required?
- Does the UTP contain risks and mitigation for key tasks not trained?
- Does the UTP contain the UTP calendar?

Commanders' Dialogues

Commanders' dialogues ensure commanders communicate with each other. Inspectors ask the following questions pertaining to commanders' dialogue:

- Did commanders' conduct dialogues?
- Did the higher commander approve the unit's METs selected to train (key output of mission analysis)?
- Is the output of the mission analysis recorded?

Mission-Essential Task List

The METL ensures units have a list of tasks to attain. Inspectors ask the following questions pertaining to the METL:

- Is the unit METL available?
- Is the unit METL posted to the DTMS and to the CATS?
- For battalion and company, does the unit METL reflect the unit's as-designed capabilities as described by the TOE or TDA?
- Is the unit METL reportable on the unit status report?

Training Objectives

Training objectives are an essential part of the commander's training vision. Overall collective task objectives help sequence training events from simple to increasingly more complex tasks. The progressive nature of the training helps build upon previously mastered skills. Inspectors ask the following questions pertaining to training objectives:

- Are training objectives published for each major training event?
- Do the training objectives support training the unit METs for each event?
- Are objectives for the leader, collective leader, collective tasks, and individual tasks identified for each major training event?

Training Schedules

Training schedules are necessary to inform Soldiers and leaders and to focus support, project resource requirements, and allow companies optimum time to prepare for training events. Inspectors ask the following questions pertaining to training schedules:

8-26 (Assessing Training) III. Organizational Inspection Program (OIP)



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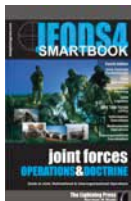


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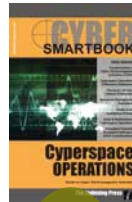


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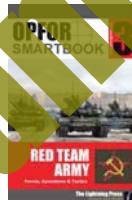
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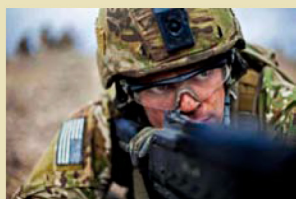
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