

Perspectives on Planning

Framing the process
by Col Michael P. Mahaney



Understanding the commander's intent is critical to a unit's overall success. (Photo by Cpl Kamran Sadaghiani.)

Graduates of the School of Advanced Military Studies (SAMS), School of Advanced Warfighting, School of Advanced Air and Space Studies, Maritime Advanced Warfighting School, and the Joint Advanced Warfighting School (JAWS) join their new commands armed with multiple compact disks (CDs) of planning templates, tools, and shortcuts. Very quickly planners learn that most of the information on the CDs is nearly use-

>Col Mahaney is a graduate of SAMS and the JAWS. He has served with Task Force 58, 1stMarDiv during Operation IRAQI FREEDOM II; with I MEF; and with U.S. Central Command. Col Mahaney is currently assigned as the Branch Head, Manpower Management Force Augmentation, Department of Manpower and Reserve Affairs.

less because units operate and standardize differently. The planners do, however, utilize the paradigms and processes they learned at school to fa-

ilitate the planning process and to produce plans and orders for the command. This article presents a general summary of planning axioms that Ma-

rine officers will find useful when participating in planning efforts.

After planning at the task force, Marine division, MEF, and combatant command levels, some patterns of operations that transcended organizations became evident. These patterns presented themselves over time, through trial and error, and while adapting classroom-based methods to the unit and task at hand. These general observations apply to the formal planning environment and to most situations involving personal interaction and problem solving. These have been validated time and again through planning experience gained during the past 8 years and help to frame the planning process for Marines whether they are school-trained planners or not. Reflecting on these processes brings focus to the planning process and enables effective results.

Integrated, coordinated planning is key. The more participation by im-

pacted organizations (higher, adjacent, and subordinate units) throughout the process the better. Although difficult and time-consuming, this method renders the best results. All participants have perspective and input that is unique and beneficial in solving the problem/task at hand. Seek contribution and feedback from the higher, adjacent, and subordinate units early and continuously. This also provides buy-in from the organizations that are actively involved in the solution that they have helped create.

Time management in planning sessions: 0830 start, 1630 stop. Yes, this can apply in a combat environment as well. Leave a buffer in the evenings (1830–2100) for use if required. This allows you to prep prior to and after and allows participants to prep/receive guidance as well. Time management also allows units to travel to and from the planning location and to conduct nonplanning-related tasks. Most par-

ticipants have additional responsibilities. Recognize burnout; don't rigidly tie the effort to a time displayed on a clock. Problem analysis and resolution often continues even when people are not working directly on a project. Expect better results from projects that are begun early rather than started late.

Space management, tools, and agenda. Prepare before not during the planning session. Spaces need to accommodate the attendees, as do the products and agenda. Setting up the environment can take just as much time as prepping products. Sit in the participants' seats and determine the best way to convey and display information. Use the agenda to review what has been accomplished and what needs to be accomplished. Assign "due outs."

Know on whom you can rely. Quickly ascertain who can be trusted to deliver quality input and who is reliable. Be aggressive in keeping the group the right size and focused.

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Seek input and contributions from staff members and supporting organizations. (Photo by LCpl Jason Spinella.)

When the process outweighs the product, reassess. Enough said.

Involve the boss early and continuously. Keep him informed; don't wait for guidance; be proactive. Invite and coordinate his attendance throughout. This keeps him involved and highlights the importance of the task at hand to the participants. If physical proximity does not allow attendance, coordinate a secure video teleconference.

Involve the chief of staff. Yes he is busy; however, he can save time and be a conduit for information across all organizational levels. The chief of staff can also assist in the early termination of unwarranted, unnecessary planning efforts.

Standardize format/templates. Provide participants the format and templates that you want to use to ensure consistency and commonality. If you allow them to use their formats/templates you will spend excessive time putting their information into your format/template.

Provide "warm start" products for participants. Not all participants have the experience or the background that ex-

perienced planners have. Assisting participants with warm start products can facilitate their understanding and support the problem-solving effort. Do your homework. You don't need to be an expert in everything; however, you do need to be conversant in many areas.

Create a timeline that supports "due outs" to your boss. Time management is critical; provide yourself ample time to prepare and ensure that you provide participants time to prepare and brief their products through their chains of command. Drive participants to stick with established timelines; flex only when absolutely necessary. Estimates of supportability are important; allow participants time to prepare them.

Update principals prior to briefing the commander. Cross-check your progress frequently (G-1 (personnel), G-2 (intelligence), G-3 (operations), G-4 (logistics), G-5 (plans), G-6 (communications), etc.). You do not want to be ambushed during a critical brief by a staff member who is mis- or uninformed.

Commander's intent, commander's battlespace area evaluation (CBAE). Un-

derstand the commander's vision and intent prior to beginning the planning process. Work with the commander to capture his perspective in writing. This can be done in many ways, such as formalizing his verbal guidance and direction (a word document can be prepared for his review), formalizing his handwritten notes, providing him an outline that he "fills in," etc. Regardless of the method, understanding the commander's vision and capturing it in writing will pay big dividends for the planners and the participants. The CBAE is a living document that requires updating throughout the process. If done properly, the CBAE becomes the base document for a written plan or order. Continually refine intent and guidance.

Proper mission analysis will drive your process. If mission analysis is done thoroughly, the plan will write itself. Too often planners spend the least amount of time on the mission analysis. Spending the most time on mission analysis allows participants to thoroughly understand the problem and provide the best assessment and recommendations.

Listen. Allow planners and participants to have their input and “say.” This will foster buy-in and support the problem-solving effort. If there is a confrontation or disagreement, get it on the table and move it off as quickly as possible. One team, one fight.

Social energy. Whenever possible meet face to face. Practice focused efficiency; use the right person for the right job. Take the time to meet on their turf. You’ll understand them better, and you’ll be better informed.

Words have precise meanings; use precise terms precisely. Don’t guess at meanings. Use the dictionary or appropriate manuals to ensure common understanding.

Marine Corps Planning Process and MAGTF Staff Training Program. Both are useful; however, the fight is always fluid. Adapt to the situation, and don’t become a rigid adherent to process or product.

Rarely three courses of action. If CBAE and mission analysis are done properly there will be only one true course of action. If you have three, you are not doing CBAE or mission analysis thoroughly enough. If your staff work is done right, the answer or solution will present itself.

Reread your base order; often you don’t need a frag order. Most base orders are prepared well and have enough tasking and coordinating instructions to satisfy many situations that unfold during combat operations. In the heat of the moment we often forget what was in the base order.

Frag orders. If you do expect to release a frag order as a result of the planning effort, have the current operations frag writer or representative at your planning session. He can write the frag order as you go through the process. The draft document can be modified quickly as required at the end of the process. This speeds release.

Some organizations and subordinates don’t have large staffs. Be sensitive to the personnel capacity of participating organizations. You can crush them with requirements. Help prioritize input and attendance.

Participants need to be able to speak for their commanders. The inability to make recommendations or advance positions during planning will delay the process. Participants need to come to the session ready to play and ready to speak for their bosses.

Planning and the process of planning are difficult. . . .

Higher headquarters always wants you to come up with their plan. Do it. At a minimum, provide them with a draft or input they can use to develop their document. This is an excellent opportunity to frame the solution and provide input to the plan.

Understand the culture of the regions and the enemy you are fighting. Do your

homework. Study 500 to 1,000 years of history. The themes you find tend to repeat themselves.

Understand the goals of the belligerents and the time and cost of achieving them. Understand the nature of the struggle; don’t mistake it for what it is not.

In my experience, these are key axioms that enable plans to survive initial contact with the enemy as well as provide a general path to proceed along during an engagement. Planning and the process of planning are difficult, and plans are living documents that are continually updated as more information becomes available. The intent is to provide guidance, to solve a difficult problem, and to achieve a desired result. The stakes are the lives of fellow Marines and fellow servicemembers. They deserve the best effort planners can provide.



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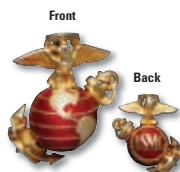
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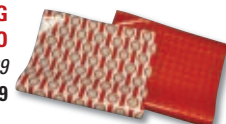


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