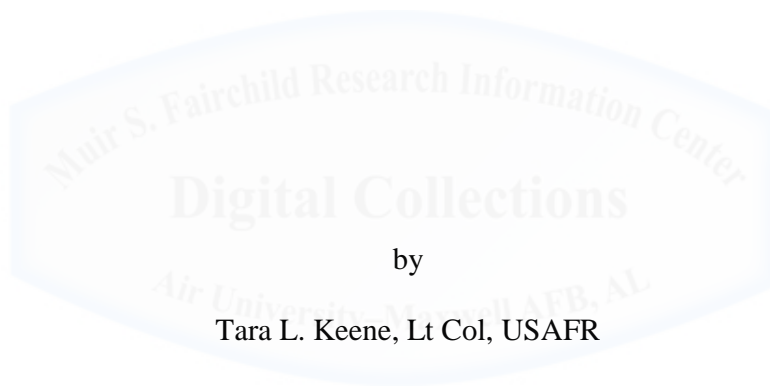


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## The Case for Cascading Strategies



by

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## PREFACE

Lt Col Tara Keene is currently a graduate student at the Air War College in the Grand Strategy Course pursuing an M.S. in Strategic Studies with a strategy emphasis. She is an Air Force Reservist with 20 years of experience, to include active duty. Her functional field is intelligence and her experience in this field additionally includes that as a civilian and contractor. She has served from the tactical to the strategic, national, and in combined operations. Her joint experience includes tours at the National Security Agency, National Geospatial-Intelligence Agency, European Command, and Special Operations Command Europe. As a civilian, she served at the national level with Federal Bureau of Investigation and the Office of the Undersecretary of Defense for Intelligence. She has supported over ten operations and crises across the Middle East, Africa, and Eastern Europe. She has a B.S. in International Affairs, an M.A. in International Affairs and an M.S. in Strategic Intelligence. She shares her life with her amazing husband and their two faithful canines, Pluto and Freyja.



## ABSTRACT

Sun Tzu advocated three maxims for understanding the reality of a situation before entering into conflict—know yourself, know your enemy, and know the environment. While it can be argued that the reality of the world environment has always been volatile, uncertain, complex, and ambiguous (VUCA)<sup>1</sup> comprised with wicked problems,<sup>2</sup> the continued economic and social integration along with rapid advancements in technology reducing space and time ensures the indeterminate longevity of these challenges. In order to effectively maneuver and succeed in this environment, senior military leaders have expressed the need for capable strategic leaders. General John Jumper averred that leaders require deliberate development “to grow into the responsibilities required of senior institutional leaders and commanders.”<sup>3</sup>

This concept of deliberate development should also hold true for developing strategy competency, as simplicity of the environment decreases and becomes more complicated and complex as one rises in the hierarchy of the organization. Additionally, missions at the tactical level can have global impact. Therefore, understanding strategy is critical for those in leadership positions within the military, as they are the key agents for enabling strategy and understanding the direct, secondary, and tertiary impacts of strategy implementation not only on the battle field during conflict, but also within an organization during peacetime.

Strategy skills require development at the most basic level, which translates that officers should be exposed to basic strategy skills upon entrance into the Air Force. While education and training are required, application is just as important and must be done in parallel. This paper will make the case that intra-organizational “unit”<sup>4</sup> cascading strategies are critical for bridging strategic guidance and campaign plans within the military enterprise to enable a more adaptive

and agile military force. The viability of this concept will be evaluated using Derek Cabrera's system's level thinking approach and organizational design construct<sup>5</sup> to provide a potential methodology for developing and implementing unit cascading strategies, as well as recommendations for implementation.

### **SCOPE NOTE**

To address strategy competency application, this paper will examine to what extent cascading strategies will enable a more adaptive military to successfully meet its desired end states. Furthermore, it will focus on the value of cascading strategies within the Air Force, but certainly applicable to Combatant, Functional, and Service Commands, as well as their respective subordinate organizations, by using two EUCOM organizational examples illustrating application from the tactical to operational. Specifically, the 2014 draft EUCOM Intelligence Strategy<sup>6</sup> and the EUCOM Intelligence Operations Branch strategy will be the examples provided to illustrate this viability. Furthermore, this assertion for cascading strategies is informed by a review of Air Force training and education curriculum and integration functions for strategy development of the officer corps. Literature reviews on applicable research from the psychology, sociology, neuroscience, history, political science, and history was also conducted for relevance in understanding organizational strategy development and implementation. Finally an evaluation of the Cabrera system thinking organizational design method—Vision, Mission, Culture, Learning (VMCL)<sup>7</sup>— was also addressed in order to enhance the scale of understanding for strategy development and its viability as a framework to implement within the Air Force and potentially joint commands to facilitate mission success.

### **ASSUMPTIONS:**

1. Systems level thinking is fundamental for the design element of strategy development<sup>8</sup>

2. Strategy development and application is a skillset that can be learned<sup>9</sup>
3. Campaign strategy and organizational strategy share the same fundamental skills and concepts<sup>10</sup>
4. Strategy application can be applied at all levels of leadership in an organization<sup>11</sup>
5. Systems are teleological<sup>12</sup>

### **AXIOMS:**

1. Everything is interrelated and interconnected and interdependent<sup>13</sup>
2. “Humans indirectly relate to reality through their mental models of it”<sup>14</sup>
3. Organizations are complex adaptive systems<sup>15</sup>
4. Systems operate by simple rules<sup>16</sup>

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<sup>1</sup> The term VUCA first appeared in Army War College curriculum development documents in 1987 and was cited as being derived from the book, *Leaders: The Strategies for Taking Charge*, by Warren G. Bennis and Burt Nanus. However, the terminology has also been attributed to General Thurman who applied the term to characterize the strategic leadership environment. Since then, the term has grown in vernacular to include not only in the military, but also public and private domains. U.S. Army War College, “Who First Originated the Term VUCA (Volatility, Uncertainty, Complexity, and Ambiguity),” U.S. Army Heritage & Education Center/USAHEC Ask a Question Website, 16 February 2018, accessed 31 March 2018, <http://usawc.libanswers.com/faq/84869>.

<sup>2</sup> Horst Riddell, an urban planner, first coined the term “wicked problem,” in the 1990s as an outcome of certain issues that could not be solved using a linear process of thinking. Specifically, he identified limitations in linear thinking to design and planning. His solution to overcome these limitations was to apply a systems analysis methodology. His solution was an invention of “Dialogue Mapping,” an Issue-Based Information System that provided “structure for rational dialogue among a set of diverse stakeholders.” Jeff Conklin, “Wicked Problems & Social Complexity,” White Paper, (CogNexus Institute, 2010), 7, accessed 31 March 2018, <http://cognexus.org/wpf/wickedproblems.pdf>; Cognexus Institute, “About Us,” Cognexus Institute Website, accessed 31 March 2018, <http://www.cognexus.org/id17.htm>.

<sup>3</sup> John P. Jumper, “Foreword,” AFDD 1-1: Leadership and Force Development, dated 18 February 2006, (Washington DC: HQ AFDC/DR, 2006), iii, accessed 31 March 2018, <http://www.safia.hq.af.mil/Portals/72/documents/AFD-070904-027.pdf?ver=2016-08-03-102920-717>.

<sup>4</sup> Unit refers to any intra-organizational structure that requires leadership and management oversight, such as a directorate, division, branch, cell.

<sup>5</sup> This approach and construct was chosen, as it focuses on simplicity, a concept integral to military operations. It is also application-based, having achieved results for various organizations in the public, private, and government domains, to include NSF, NIH, and USDA-NIFA, and other federal agencies, K-12 schools across the globe, higher learning institutions, to include West Point military academy, business schools, corporations, and Silicon Valley companies. The book, *Systems Thinking Made Simple*, addresses this organizational construct design and won the 2017 AECT outstanding book award. “Our Research Faculty: Derek Cabrera,” *Cabrera Research Lab*, accessed 31 March 2018, <https://www.crlab.us>.

<sup>6</sup> The 2014 EUCOM strategy remained in draft format as the incoming Director held the dichotomous view of his predecessor regarding the value of strategy. This draft strategy was designed for multiple purposes: to provide tailored functional guidance within the Directorate for implementing tasks set forth in the Theater Campaign Plan; communicating functional prioritization of effort to the Command and its geographic enterprise, the Services, Office

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of Secretary of Defense, the Intelligence Community, and Congress; as a tool to assess effective use of resources and capability to achieve the mission and redirect as required; and to educate incoming personnel to the Command and to Congress.

<sup>7</sup> VCML is framework or “simple rules followed by a group of systems thinkers to bring about the vision of the organization.” Cabrera, 187.

<sup>8</sup> System level thinking is a nonlinear thinking approach to better understand reality by examining different aspects of the issue from different angles. Cabrera asserts that a twenty-year comprehensive review of 100 years of systems thinking methods and approaches in the systems thinking field has unearthed four underlying elements or simple rules—distinctions, systems, relationships, and perspectives— of looking at a wicked problem that can be used to better understand it. Additionally, systems thinking must not be thought of as a process, but as an outcome or end, as it is emergent and not a means. In other words, systems thinking is the product of what evolves, as you are able to influence and control the ability to train key agents and adjust the simple rules. Ibid., 24, 45.

<sup>9</sup> Just as strategic sense can be taught through examinations of historical engagements, strategy development can be taught for application through rules, frameworks, and methodologies. In music, not everyone has the talent to understand intuitively how to play an instrument and be creative in composing. The same can be said for strategy, as not everyone innately is able to “see” effects across the spectrum of operations and from the strategic to tactical level to identify opportunities and vulnerabilities to drive adaptation. However, one can be taught to play an instrument through understanding music theory, rules, and methods. Likewise for strategy, one in the military can be taught to develop strategic sense and strategy development by providing a structure to include historical knowledge on strategic theory, frameworks, methodologies, methods, and tools.

<sup>10</sup> It can be argued that the same framework and methodology can be applied in campaign strategy and organizational strategy. Both have visions that provide a service or product. The strategy is built as a measurable, adaptive tool to meet that quality of service or product, thus enabling informed decisions to change course if objectives are not being met. The difference between the two strategies is the underlying motivator—defense, profit, or public good. While the differences will shape the ways, they are irrelevant to the process. The framework of ends, ways, means remains applicable to any these strategies. They should have a methodology to ensure the strategy is measurable and allows for adaptation. Additionally, both have a vision and a mission, and require communication. In conflict, military will use strategy and tactics. In steady state nonconflict, military will use strategy and tasks.

<sup>11</sup> Strategy has been applied to practically every field and at every level, to include the individual at the personal level, specifically in attaining life goals.

<sup>12</sup> Using the classical notion, every system has a purpose. With regard to the military, units within the military are systems, and the purpose of the unit is to effect the desired end state.

<sup>13</sup> This is the core axiom within both systems theory, quantum physics, and quantum biology. Cabrera asserts that we don’t understand complex wicked problems because we don’t understand reality. A better understanding of reality occurs when the right mental model can get “right enough.” Systems thinking helps people better understand their reality by displaying the interrelatedness, interconnectedness, and interdependence of the issue trying to be understood. Cabrera, 187-188, 31-32. This systems-of-systems perspective in systems theory has been upheld in science by both behaviors and at the cellular level. Quantum biology now has evidence that all things on this earth are comprised of cells from each other. In other words, human cells are not just human cells. They contain cells from all living systems on the earth. This illustrates the degree of interconnected of things. Depaak Chopra, “Reinventing the Body,” TEDxTimesSquare, 18 July 2014, accessed 6 January 2018, <https://www.youtube.com/watch?v=kZt3DNCcEtA>.

<sup>14</sup> This is also a core axiom for systems theorists. It is based on another underlying assumption that humans do not interact with reality directly. Instead, they interact through perceptions or mental models. Verbiage taken from Cabrera, 224. David Banner and T. Gagné best describe the root cause of indirectness with reality as the “beliefs, attitudes, values, expectations, and assumptions that humans implicitly hold in their conscious and subconscious minds.” David Banner and T. Gagné, *Designing Effective Organizations: Traditional and Transformational Views*, (London, Sage Publications: 1995), 98. Classical philosophers proposing categorization as the key to understanding also align with this theory. Kant’s use of categorization is not unduly similar to Cabrera’s DSRP, as they both are finding ways to seek the root cause. Additionally, Cabrera’s approach was able to simplify systems level thinking to four irreducible basic rules, with two elements each. Specifically, distinctions (thing and other) are similar to quality; systems (parts and wholes) are similar to quantity, relationships (action-reaction) are similar to relations (if, then), and perspectives (point and view) are similar to modality. The biggest difference is that DSRP is simpler to apply, mitigates biases, and is able to be visualized, while aiming for the same result.



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<sup>15</sup> According to Cabrera, all complex adaptive systems follow simple rules as they are outcomes that follows a process. Just as Cabrera makes a case for systems thinking being a complex adaptive system, strategy development or thinking can also be considered a complex adaptive system. Strategy is an outcome that follows a process. Ibid, 45.

<sup>16</sup> It is a “complex emergent property” whereby “simple rules and key agents enable collective behavior and emergence.” Ibid.



## Chapter 1: The External Imperative

Since 2001, the estimated cost in blood and capital of the United States being involved in conflict overseas, to include Afghanistan and Iraq, ranges between \$2 trillion to more than \$12.7 trillion with over 81,000 casualties.<sup>1</sup> During this time, the U.S. has involved itself in conflicts without a clear, comprehensive, integrated strategy, nor has it arguably met one of the most important stated political goals—keep America safe from attack.<sup>2</sup> To provide additional context, international terrorism targeting United States infrastructure and personnel has only constituted 7.8% of worldwide international terrorism with 95.6% targeting military institutions, diplomatic offices, and businesses worldwide, suggesting potential issues with U.S. policy approach.<sup>3</sup> Additionally, these conflicts have put substantial wear and tear on our military platforms, provided valuable insight into our techniques, tactics, and practices, and exposed our vulnerabilities. With the increasing capability of near peer competitors across the national instruments of power, the most concerning of these capabilities are associated with the military.

Currently, the U.S. ability to prevail in a conflict is questionable with the current and downward trending condition of the military.<sup>4</sup> The U.S. Air Force has come up with a new strategy<sup>5</sup> to turn this trend around, but its ability to do so and in a rapid manner is questionable as it lacks the internal mechanisms within its bureaucracy to facilitate it. Specifically, nested strategy application cascading across and within the Air Force is lacking and may be representative of the larger military enterprise.<sup>6</sup> A RAND study illuminates that this lack of understanding and acceptance of the value of strategy may stem from “many Air Force’s senior leaders [being] skeptical of long-term strategic planning, and some even doubt[ing] its utility altogether.”<sup>7</sup>

The current military construct for strategy is that national guidance—the National Security Strategy, the National Defense Strategy, and the National Military Strategy—informs and guides the development of the Combatant Command strategies. The Theater Combatant Commands develop campaign plans that should integrate the Services Combat Commands, who then should develop supporting strategies. Sometimes, the strategy development is out of sync. Additionally, strategy development within these organizations is not emphasized, as the Theater Campaign Plan becomes the supported mechanism. The reliance on a plan at this level risks that the organization becomes bureaucratically heavy, sluggish, and unadaptable, as it is task-driven. A culture of planning creates a complicated machine, but a culture of strategy creates an adaptive organization. Thus, developing “unit” cascading strategies is critical for bridging strategic guidance and campaign plans within the military enterprise to enable a more adaptive military to meet today’s steady state threats. The goal of the new Air Force strategy hopes to create an adaptive, agile force. The following sections address how the Cabrera organizational construct model can facilitate this success.

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<sup>1</sup> These costs vary due to factors included, such as real total cost of the conflicts to those that include life-time costs of caring for veterans, interest costs on past appropriations, or increases to the Department of Defense’s base budget based on support requirements for conflict sustainment. In addition to U.S. casualties, the emotional and psychological stress of supporting this prolonged conflict has not adequately been captured. For more information on the cost of conflict since 2001 and the difficulty in understanding the associated costs, see Anthony Cordesman, “U.S. Military Spending: The Cost of Wars, *Center for Strategic & International Studies* webpage, 10 July 2017, accessed 9 January 2018, <https://www.csis.org/analysis/us-military-spending-cost-wars>; For details on casualties related to conflicts engaged in by the U.S., see Department of Defense, “Defense Casualty Analysis System,” 8 January 2018, accessed 9 January 2018, [https://dcas.dmdc.osd.mil/dcas/pages/report\\_oif\\_woundall.xhtml](https://dcas.dmdc.osd.mil/dcas/pages/report_oif_woundall.xhtml).

<sup>2</sup> Since 2001, there has been 97 attempts on U.S. continental soil. Previously, the first recorded international terror attack on U.S. mainland was on 23 February 1993 and none had been documented again until 11 September 2001. David Inserra, “Foiled Virginia Attack Brings Total US Terror Plots to 97 Since 9/11,” *The Heritage Foundation*, 7 September 2017, accessed 9 January 2017, <https://www.heritage.org/terrorism/commentary/foiled-virginia-attack-brings-total-us-terror-plots-97-911>.

<sup>3</sup> *Ibid.* The uptick in attacks in the homefront of the United States vice overseas suggest a policy and strategy relook to assess whether the ways and means are achieving the desired effects.

<sup>4</sup> The U.S. Military Index of Military Strength assesses U.S. military capability as weak to marginal, but trending toward weak across the Service capabilities and the national strategic nuclear capability. For more information regarding these assessments, see “Highlights from the 2017 Index,” *Heritage Foundation*, accessed 9 January 2018, <http://index.heritage.org/military/2017/assessments/>; Nikita Vladimirov, “Russia, China Making Gains on US Military Power,” *The Hill*, 18 March 17, accessed 31 March 2018, <http://thehill.com/policy/defense/324595-russia->

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[china-making-gains-on-us-military-power](#); For raw comparison of numbers, see “2017 Military Strength Ranking,” *Global Firepower*, 2018, accessed 31 March 2018; <https://www.globalfirepower.com/countries-listing.asp>; Brad Wenstrup, “U.S. Military Readiness Crisis to Action for Congress,” *The Hill*, 4 April 2017, accessed 31 March 2018, <http://thehill.com/blogs/congress-blog/politics/327087-us-military-readiness-crisis-a-call-to-action-for-congress>; Alex Lockie, “How the World’s Largest Military Stacks up to the US Armed Forces,” *Business Insider*, 5 August 2016, accessed 31 March 2018, <http://www.businessinsider.com/chinese-us-military-comparison-2016-8>; James Stavridis, “China’s Military Power Already on Par with US in East Asia,” *Nikkei Asian Review*, 22 November 2017, accessed 31 March 2018, <https://asia.nikkei.com/Viewpoints/James-Stavridis/China-s-military-power-already-on-par-with-US-in-East-Asia>.

<sup>5</sup> Mark A. Welsch III, “A Call to the Future: The New Air Force Strategic Framework,” *Air and Space Power Journal*, (May-June 2015), 5-6, accessed 31 March 2018, [http://www.airuniversity.af.mil/Portals/10/CMSA/documents/Required\\_Reading/Call%20to%20the%20Future.pdf](http://www.airuniversity.af.mil/Portals/10/CMSA/documents/Required_Reading/Call%20to%20the%20Future.pdf); Mark A. Welsch III and Deborah Lee James, *USAF Strategic Master Plan*, (May 2015), 13, 36, accessed 31 March 2018, [http://www.af.mil/Portals/1/documents/Force%20Management/Strategic\\_Master\\_Plan.pdf](http://www.af.mil/Portals/1/documents/Force%20Management/Strategic_Master_Plan.pdf).

<sup>6</sup> Anecdotally, this was seen as lacking at EUCOM and some “steady state” deployed Army- and Air Force-run locations. Throughout my career, arguments for not employing sub-strategies at various military organizations varied from nonunderstanding to ignorance to “lane justification” to laziness. These arguments were characterized by remarks like:

- Strategy is so vague; I can’t apply it
- Strategy is something Commanders have to do... it doesn’t mean anything
- Strategy is a Commander’s job... I don’t want him to think I’m trying to show him up by creating my own strategy
- Strategy is too hard and a waste of time... I don’t want to do it. We have a Theater Campaign Plan that should be good enough.

<sup>7</sup> If there is little utility seen in long term planning, its implicit that strategy is not viewed as having utility either since it is a precursor to planning. Raphael S. Cohen, *Air Force Strategic Planning: Past, Present, and Future*, (Santa Monica: RAND Corporation, 2017), vii, accessed 31 March 2018, [https://www.rand.org/content/dam/rand/pubs/research\\_reports/RR1700/RR1765/RAND\\_RR1765.pdf](https://www.rand.org/content/dam/rand/pubs/research_reports/RR1700/RR1765/RAND_RR1765.pdf).

## Chapter 2: Strategy Competence Is A Necessary Leadership Skill

Cabrera says the goal of organizations should not be to operate “like a complicated machine,” but rather a “complex living organism ...that can adapt quickly to the changing environment, be resilient when times are tough, and most of all be dynamic and alive.”<sup>1</sup> Within his simple rules for organizational design, Cabrera contends that having the right key agents is one of the most important leverage points in an organization because key agents are critical to developing the culture of the organization.<sup>2</sup> Applying this concept to the Air Force or the military as a whole means that the Air Force or other military organizations must have trained strategists in key positions that enable the organization’s strategy by identifying and recruiting key talent, training, mentoring, motivating, and incentivizing in order to build a culture of strategy.

According to the Pentagon Office of Strategic Policy, the need for strategists outnumber the production capability of the schoolhouses, which meets approximately 35% of the requirement.<sup>3</sup> A closer look at the Air Force system shows that this approach recognizes the most basic need for strategists at the strategic and operational planning levels in specific planning positions. Additionally, strategy is seen as a niche area of expertise that is initially developed when an officer is essentially halfway to three quarters through his or her career. The deliberate effort to develop strategists is still in the nascent stage in the Air Force. The strategist designation is a relatively new phenomenon over the last decade, having arisen only with the development of School of Advanced Air and Space Studies and Joint Advanced Warfighting School. Air War College also developed a strategy program, the Grand Strategy Seminar (GSS), whose graduates now receive the strategy designator.<sup>4</sup> However, placement in a “strategy position” is not

guaranteed nor emphasized.<sup>5</sup> The fact that the investment made in these individuals did not satisfy a requirement illustrates deliberate effort needs to be made to develop the application stage. On a positive note, many of these individuals are headed into leadership positions that could be a “key agent” for the organization if they apply the knowledge they learned and developed a cascading unit strategy.

Another tension in the system for building strategy capability is that strategists are not given the same consideration as those in leadership and command positions for promotion to Colonel. As strategists are staff officers, being placed in a strategy position near promotion to Colonel risks being overlooked. This combined with the RAND study finding cited previously illustrates that this capability will struggle to be implemented without strong senior leadership support reinforced with institutional support.

One other tension is sequestration. When Service Commands and Combatant Commands are forced to downsize, strategy branches, cells, or positions often are cut, as they are viewed predominately as one of the areas seen as nice to have and not need to have.<sup>6</sup> Prioritization by commands focus fundamentally on operations and planning, but not necessarily strategy. As previously identified, the structure is neither developed nor integrated to provide well-developed strategists that can facilitate the agility needed by the Air Force. Additionally, the myopic view of linking strategy only to planning activities and not including leadership positions increases the risk of not achieving an agile force by 2030.

Why is the current approach insufficient? Knowing how to build an effective strategy at the Command level requires experience and skill because the environment is complex. Like any skill, it has to be learnt and applied. Furthermore, strategy is a useful tool that helps to frame thinking, prioritize actions, and evaluate progress. Moreover, strategy is not just a skill or even a

tool, it is also a process. While strategy starts at the national level, it must be integrated down to the lowest levels in order to be effective. This integration is what gives the strategy synergy. It is for this reason that strategy is applicable to every officer in a leadership position from the tactical to the strategic and should not be limited to the plans arena.<sup>7</sup> By waiting to teach strategy at the field grade officer level, the Air Force is providing a disservice to its airmen, itself, and arguably its mission to this nation. To sum up the development requirement for strategy skills, one need only to refer to General John P. Jumper's guidance on leadership.

“Leaders do not appear fully developed out of whole cloth. A maturation must occur to allow the young leaders *to grow into the responsibilities required of senior institutional leaders and commanders.*” ... Those leaders can only be created through an iterative process of development involving education, training, and expeditionary operations seasoned with experience and ongoing mentoring by experienced leaders.”<sup>8</sup>

The Air Force's current approach for teaching skills is to educate, train, and gain experience. As strategy is so critical to the success of an organization, each officer should be trained on how to develop an effective one and at the earliest professional educational experience—Officer Training/Candidate School, Service Academy, and ROTC. After that foundation has been established, each successive professional education training only has to build upon the skill to enable future leaders when confronted with a complex environment, so that they only have to account for the added complexity as opposed to learning an entirely new skill set.

Habit building for strategy can help address this deficiency in experience or application within the Air Force enterprise. Strategy development and execution should be practiced operationally by any officer in a leadership position. This application will be addressed in the subsequent section. Additionally, there is an adage that practice makes perfect. A skillset takes time to develop and when employed often enough becomes a habit. According to a leading study performed by the University College of London, habit development averages 66 days, but

can take anywhere from eight days to 254 days, depending upon the person and the complexity of the skill being learned.<sup>9</sup> Making this investment upfront will pay dividends to the Air Force. A Harvard Business study provides credence to the supposition that achievement is highly probable with stated goals.<sup>10</sup> The implementation of cascading strategies integrated into every facet of the organization would likely ensure more effective leaders and a more agile, adaptive organization.

Furthermore, experience is often directionless, as it is primarily gained through a “sink or swim” approach. For strategy skills to be turned into a skill, leaders need to lead by example and to provide systematic feedback and counsel, at least on a quarterly basis aligned to readiness reporting cycles.<sup>11</sup> This cyclic feedback and counsel sessions provides ample time to evaluate the strategy and adjust it. Depending upon the mission sets and experience level or capability of the officer, this informative loop might require engagement more often. This discretion should be left to the chain of command to evaluate. Including strategy skills as a part of leadership on the officer’s performance report is an excellent means to regulate the bureaucracy to ensure leaders are helping future leaders hone this indispensable skill.

Cabrera states most organizations fail as they only implement a vision and mission, whereas culture and learning in an organization must be achieved as well.<sup>12</sup> The Air Force needs to create a culture of agility. Making strategy a part of the Air Force leadership culture is an effective way to create this culture of agility. In a military culture, developing strategy provides direction to the organization at each of its bureaucratic levels. This implementation provides a synergistic, force multiplying effect that in its essence produces the hum of a well-tuned Air Force engine. Nobel Prize winner Gell-Mann maintained that adaptation requires thinking and learning for impacts both on the local and global level.<sup>13</sup> Cabrera asserts that the preponderance of effort



should be placed on “building a culture of systems thinkers<sup>14</sup> that are laser focused on your vision, and the simple rules of your mission” in order to create a shared mental model.<sup>15</sup> This culture and learning is effected through “key agents,”<sup>16</sup> who are responsible for activities like recruiting to hire the requisite talent, and supervising, leading, and planning to incentivize talent to be systems thinkers as they develop strategy for their units.

Why is systems level thinking so important to strategy? Strategy necessitates the best understanding of reality in order to better develop sound ways. Systems thinking provides one of the best methods for understanding, as it enables a deliberate, expansive analysis that reveals biases and faulty logic in one’s thinking patterns and forces one to examine the issue holistically. Daniel Kahneman, in his book *Thinking, Fast and Slow*, illuminated the cognitive biases in human judgement and the difference in our thinking mechanisms as they apply to life’s problems. While system 1 thinking used cognitive satisficing<sup>17</sup> to make day-to-day decisions, system 2 thinking handled more complex problems, but was much slower.<sup>18</sup> Cabrera asserts that systems thinking using the simple rules of DSRP enables better systems 2 thinking and increases accuracy and speed in thinking.<sup>19</sup> A method that helps improve our thinking, reduces our biases, and can improve our thinking speed on complex problems in a world where decision space is being reduced due to advanced technology and economic and social integration should be examined for utility in military organization. Situational awareness and time are critical for decision making and operational advantage.

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<sup>1</sup> Cabrera, 189.

<sup>2</sup> Key agents are leverage points in your organization that build the necessary culture to support your strategy. These agents should be systems thinkers so they can guide, mentor, and if necessary teach others how to be systems thinkers to further the cognitive capability of the organization. This development is not just intellect, but on emotional intelligence as well. Ibid, 194-195.

<sup>3</sup> Interview with Col Earnest Bonner, HAF A5/SS, “Owls”, 5 December 2017. SASS and JAWS, as part of Air Command and Staff College, and GSS, as part of Air War College, only produce approximately 40 persons per year. To give perspective, only 12 of the approximate 300 or 4% of graduating officers are given a strategy designator. While manning documents have no positions codified yet with a strategy designator, they do have strategy positions

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identified. However, the mechanism to emplace graduates into these positions is not well developed. However, many manning documents do not reflect the actual positions in the organizations as the Commanders have the ability to organize according to need. The current strategy schools are at the Field Grade Officer Level in the U.S. Air Force.

<sup>4</sup> Currently, a request for retroactive designation for previous GSS graduates is undergoing the approval process.

<sup>5</sup> The current GSS FY18 graduating class has none of its participants filling a strategist position or role. The author is a member of the GSS FY18 class.

<sup>6</sup> In the 2012-2013 EUCOM reorganization caused by sequestration, EUCOM J2 deleted its strategy branch, but left a strategy position that was outsourced to the Reserves to fill. In 2014, the position was deleted. This information comes from personal experience, working in the J2 plans division as the sole J2 strategist at that time.

<sup>7</sup> Strategy has now been applied to all almost every disciplinary field and is executed in practice by governmental, private, and public sectors, to include individuals. Strategists assigned to planning positions use strategy according to the DoD Dictionary of Military and Associated Terms, defined in Joint Publication 3.0 as “a prudent idea or set of ideas for employing the instruments of national power in a synchronized and integrated fashion to achieve theater, national, and/or multinational objectives.” “Strategy,” *DoD Dictionary of Military and Associated Terms*, August 2017, accessed December 11, 2017, [http://www.dtic.mil/doctrine/new\\_pubs/dictionary.pdf](http://www.dtic.mil/doctrine/new_pubs/dictionary.pdf). The secondary definition in Merriam-Webster’s dictionary defines strategy as “a careful plan or method, or the art of devising or employing plans or stratagems toward a goal.” “Strategy,” Merriam-Webster.com, accessed December 11, 2017, <https://www.merriam-webster.com/dictionary/strategy>. Michael Watkins defines business strategy similarly but instead of employing national instruments of power you are “a set of guiding principles that, when communicated and adopted in the organization, generates a desired pattern of decision making. A good strategy provides a clear roadmap, consisting of a set of guiding principles or rules, that defines the actions people in the business should take (and not take) and the things they should prioritize (and not prioritize) to achieve desired goals.” “Demystifying Strategy: The What, Who, How, and Why,” *Strategic Planning*, Harvard Business Review, 10 September 2007, accessed 10 January 2018, <https://hbr.org/2007/09/demystifying-strategy-the-what>.”

<sup>8</sup> John P. Jumper, AFDD 1-1, *Secretary of the Air Force*, 18 February 2006, accessed 31 March 2018, <http://www.safia.hq.af.mil/Portals/72/documents/AFD-070904-027.pdf?ver=2016-08-03-102920-717>.

<sup>9</sup> More complex or complicated tasks take a significant amount of time to become habitual as opposed to a simple tasks which can form into a habit in a week. Phillipa Lally, Cornelia H. M. van Jaarsveld, Henry W.W. Potts, and Jane Wardle, “How Are Habits Formed: Modelling Habit Formation in the Real World,” *European Journal of Social Psychology*, 16 July 2009, accessed 19 December 2017, <http://onlinelibrary.wiley.com/doi/10.1002/ejsp.674/abstract>.

<sup>10</sup> “Goal Setting Facts,” *Personal Plan* Website, accessed 12 December 2017, [http://www.personalplan.com.au/2\\_PersonalPlan/Goal\\_setting\\_Facts/index.html](http://www.personalplan.com.au/2_PersonalPlan/Goal_setting_Facts/index.html). for an example on how goals and strategies work at the global level, see United Nations, *The Millennium Goal Report 2015*, accessed 13 December 2017, [http://www.un.org/millenniumgoals/2015\\_MDG\\_Report/pdf/MDG%202015%20rev%20\(July%201\).pdf](http://www.un.org/millenniumgoals/2015_MDG_Report/pdf/MDG%202015%20rev%20(July%201).pdf), 4.

<sup>11</sup> The author proposes quarterly basis as it can inform and provide more robust feedback in the readiness reporting cycle. This feedback and counsel with your section chiefs should take approximately a half hour and pays dividends in developing the officer, providing situational awareness, and contributing to more informed reporting in systems of record.

<sup>12</sup> Agility is the adaptation needed to be achieved. For more information on organizational simple rules of vision, mission, culture, learning (VMCL), see Cabrera, 187-234, for failure, see Cabrera, 212 and 234.

<sup>13</sup> Ibid, 193.

<sup>14</sup> Cabrera asserts that systems thinking can be achieved using the “simple rules” of DSRP or distinctions, systems, relations, perspectives when trying to understand a complex issue.

<sup>15</sup> Ibid, 194.

<sup>16</sup> Ibid.

<sup>17</sup> Satisficing refers to the tendency of decision makers to select the first option that addresses most of the desired conditions rather than running through all options and then selecting the most optimal solution. The term was coined by Herbert A. Simon in his book *Administrative Behavior*.

<sup>18</sup> *Thinking, Fast and Slow* was the 2012 winner of the National Academies Communication Award one of the Economist’s 2011 Books of the Year. Daniel Kahneman, *Thinking, Fast and Slow*, (New York: Farrar, Straus and Giroux, 2011), 20-22.

<sup>19</sup> The use of DSRP in itself aided accuracy; the habit of using DSRP with the associated tools increased the speed. DSRP was addressed in Note 14. Cabrera, 30.

### Chapter 3: Understanding Strategy

Strategy is a universal concept that applies to competition. At its most fundamental basis, strategy is a method to gain comparative advantage in a competitive environment.<sup>1</sup> An evaluation of historical records demonstrate strategy was implicitly at play as civilizations rose and fell. However, the term is deemed relatively modern, as it did not come into widespread Western vernacular acceptance until the late 1700s to early 1800s.<sup>2</sup> Most, if not all, historians and political scientists believe strategy belongs in the realm of security, as much of the development of strategy has been in the application of warfare. However, strategy can be applied to any discipline and at any level from personal to organizational to nation-states. Inherent in the definition of strategy, are the concepts of ends, ways, means, and risk.<sup>3</sup> When pursuing objective(s) and/or end state (ends), one must consider the ways in which this end state or objective(s) can be achieved with the resources available (means), as well as address the risks associated with each way to determine the best course(s) of action.

Sun Tzu stated that one must know oneself, the enemy, and the environment to achieve success. This adage still holds true today, as Sun Tzu identified the framework for understanding the operational environment. The use of DSRP enables the understanding of the operational environment when applied to the framework. The understanding of the operational environment is the pillar to strategy development. Once one has grasped a sound understanding of the reality of the current environment or potentially transforming environment, it is equally important to understand history and to include it in the analysis of DSRP. David Halberstam, in *The Best and the Brightest*, poignantly highlights the importance of history when examining why the US went to war with Vietnam.<sup>4</sup> Without understanding both the reality and the past, one is

highly susceptible to not getting the mental model “good enough.” This understanding of the foundation for building a strategy underscores the complexity and critical thinking required as an environment grows more complex. In the VUCA (volatile, uncertain, complex, and ambiguous) environment, one can surely appreciate that successful strategies are an outcome of a more developed process in order to increase the probability of success. Therefore, one of the foundations essential for strategy is systems thinking.

The true art of strategy is not an easy task. It takes not only critical and creative thinking, but also time to develop an effective strategy. Time is essential to facilitate thinking. However, time is often a luxury in the military, especially being under sequestration for over five years, the stress from an almost unending involvement in contingency operations over the past two decades,<sup>5</sup> and advances in technology that contribute to information saturation and shrinking decision making space. Having a sound strategy helps shave time by enabling quicker decision making. Once the pre-investment of time is made in developing the strategy, one can better understand how it will impact the means for carrying out that strategy and whether you need to modify your ways or even reevaluate the end state, thereby saving time during a crisis. Cabrera asserts that “to achieve our desired ends we must focus on the process.”<sup>6</sup> Just like complex adaptive systems in nature (like ants or a flock of birds), “simple rules repeated often and done by many lead to big changes.”<sup>7</sup> This is the key to an agile force.

Strategy also requires competency in understanding how to construct one and what factors need to be considered. While most military leaders can rattle off that strategy is ends, ways, means, few know how to construct one and fewer still know how to construct a “measurable” one.<sup>8</sup> Basic entry Air Force level officer schools, intermediate officer schools, and senior level school teach theoretically about strategy, but not how to construct one. Only select special

courses at the field grade level teach this skillset. As every practitioner knows, executing something is far harder than talking about doing it. How does one learn how to do one?

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<sup>1</sup> Gause's "Principle of Competitive Exclusion" states that "no two species can coexist that make their living in the identical way." Henderson, Bruce D., "The Origin of Strategy," *Harvard Business Review*, November-December 1989, no. 6, 139, accessed 18 October 2017, <https://hbr.org/1989/11/the-origin-of-strategy>.

<sup>2</sup> The concept of strategy is overtly discussed in Chinese writings, to include Sun Tzu's *Art of War*, which dates back to approximately 538 B.C. In the Western Hemisphere, the term strategy is credited to the Greeks in 330 A.D. It is specifically derived from the Greek word *strategos*, that was used to denote a military general or military governor. Notably, it was not actually a word used to denote strategy. The closer Greek term would have been *strategemata*. In the first century A.D., Frontinus' work, *Strategemata*, documents a list of strategems for war based on wisdom gleaned from past conflicts. For the specific strategems included in this work, see Frontinus, *Strategemata*, Loeb edition, 1925 by Charles E. Bennett, accessed 18 October 2017, <http://penelope.uchicago.edu/Thayer/E/roman/Texts/Frontinus/Strategemata/home.html>. For an excellent rundown on the history of the term strategy, see Sir Lawrence Freedman, "The Meaning of Strategy, Part I: The Origins," *Texas National Security Review*, 26 October 2017, accessed 11 December 2017, <https://tnsr.org/2017/10/meaning-strategy-part-origin-story/>.

<sup>3</sup> While these terms are military concepts, they are applicable to any subject matter to which strategy is applied. For the military definition of ends, ways, means and the way these concepts are applied to strategy, see JP 3.0, 17 January 2017, II-4, accessed, 18 October 2017, [http://www.dtic.mil/doctrine/new\\_pubs/jp3\\_0.pdf](http://www.dtic.mil/doctrine/new_pubs/jp3_0.pdf).

<sup>4</sup> Relevant history of Hanoi was not considered, while the history of Munich was misunderstood. Victor S. Navasky, "How We Got Into the Messiest War in Our History," *The New York Times*, 12 November 1972, accessed 31 March 2018, <https://archive.nytimes.com/www.nytimes.com/books/98/03/15/home/halberstam-best.html>

<sup>5</sup> Historically, the U.S. has been almost in a constant state of conflict or supporting conflict since its creation. A timeline capturing the years and wars the US has been involved in can be found by Danois, "America Has Been at War 93% of the Time- 222 out of 239 Years- Since 1776," updated and republished by globalresearch.org at <https://www.globalresearch.ca/america-has-been-at-war-93-of-the-time-222-out-of-239-years-since-1776/5565946>.

<sup>6</sup> Cabrera, 238.

<sup>7</sup> Ibid.

<sup>8</sup> Measurable is the ability to create measures of performance and effectiveness to evaluate your ways, the achievement of the end, and the capability, capacity, and competency of the workforce. The draft 2014 EUCOM J2 Strategy was built specifically to be measurable.

## **Chapter 4: Developing Cascading Unit Level Strategies As a Bridge to Campaign Plans**

During steady state, which normally consists of Phase 0 and Phase 1 operations, the mission typically involves stability operations and readiness. The Commander's strategy and the Theater Campaign Plan are respectfully the guiding and tasking documents for the organization. However, each unit in the Command needs to understand how to it aligns to these documents as they are still broad in application. Tailored unit strategies provide a way to give this coherence. Additionally, by building these intra organizational unit strategies, each unit is able to develop enhanced situational awareness of the way the unit fits and aligns in the organization, so that opportunities for adaptation are seized.

Whether the strategy skills are used for military operations or running a unit, a framework and a methodology is needed to help communicate the reasoning of how the strategy was developed to establish coherence in the organization. If agility is being sought, a strategy would preclude a workforce of automatons and provide better understanding of the strategy itself to foster adaptation. A sound strategy should have a simple methodology and framework so it can be understood, flexible, and measurable. Ideally, it should be depicted pictorially to enhance understanding of the strategy and is another tool to build culture within the organization.<sup>1</sup> It should be able to give each leader the ability to understand and articulate easily their status on competency, capability, and capacity. Most importantly, the successfulness should be framed by whether the courses of action taken are achieving the desired effects. These effects are nested in the next highest strategy in order to create the synergistic outcome of collective behavior and emergence, as well as agility.<sup>2</sup> With these shaping factors in mind, this author proffers that the

methodology for a unit strategy are as follows: understand reality, establish a mission-vision statement, apply your framework, integrate, assess and adjust, and incorporate and reiterate.<sup>3</sup>

A comprehensive understanding of the reality surrounding your mission is essential to the development of a sound strategy. While the reality will never be fully understood, both Herbert Simon and Georg E.P. Box believed that mental models could be good enough to be useful.<sup>4</sup> The simple rules of know yourself, know your environment, and know the actors operating in that environment (YEA) is the framework for analyzing the operational environment.

Using DSRP as a tool to enhance this understanding would also be helpful. For example, a unit chief developing a strategy would start by looking at the unit (know yourself). As a strategy should be requirements-based, one of the first questions to ask is “what are the requirements for my mission?” followed by “why?” Are they still relevant? Do they align to higher strategy? See Appendix 1 for more baseline questions. When applying DSRP, the scope of understanding increases. For example, R (relations) forces one to look at who all your customers, coordinating offices, chain of command is to understand the scope of your mission reach. P (perspectives) causes you to consider the perspectives of each of the offices that work for you, work with you, and for whom you work. P can identify tensions, seams, and gaps in your unit and mission. When looking at the environment, one needs to consider internal and external variables or influencing factors, such as budget, bureaucracy, challenges, legal constraints, technological advances/cyber, trending issues. As for actors, know who can help facilitate, who will put up roadblocks and why, the personalities of your people and your supervisory chain.

For a tangible example, when I was working at EUCOM overseeing Watch Operations, I developed a strategy with input from my team. I looked at the requirements of the mission—what needed to be produced or coordinated and the reasoning behind these requirements. I

evaluated shortfalls and successes. This approximate understanding of the reality in which your unit operates serves as the foundation for your decision making and strategy building. Without this understanding, the success of your mission is at undue risk.<sup>5</sup> While a strategy is always at risk due to chance or unknown complexity or interactions, a strategy is an aid to help you weather that storm or chance event. It allows you to quickly reassess, prioritize, and redirect.

Before a strategy can be started, the vision and mission should be developed if not already in place. A strategy at its most basic level is the approach or the design on how you will achieve the vision-mission.<sup>6</sup> While the Air Force has adopted separate vision and mission statements, it should consider adopting a vision-mission statement. Its simplicity and memorability will aid in vectoring Air Force personnel to achieve their respective missions, as it serves as a leadership tool, a management tool, a culture-building tool, and an organizational adaptation tool.<sup>7</sup> Cabrera gives an example of mission as engage, educate and empower (E3) and vision as 7 billion Systems Thinkers (7BST) in his quest for ensuring future innovation with the United States.<sup>8</sup> The vision-mission statement then becomes engage, educate, and empower 7 billion systems thinkers or E37BST. This vision-mission statement can then become a mantra or rallying cry for the troops! General George W. Casey Jr. applied systems thinking when he created the mission for Afghanistan—Clear. Hold. Build.<sup>9</sup> The U.S. military has yet to effectively create a vision-mission statement. They are currently paragraphs that no one will remember in entirety, if at all. See Appendix B for parameters on developing effective vision-mission statements.

Who creates this vision-mission? The leader of the unit in collaboration with his team. Utilizing a collaborative effort aids fosters buy-in, especially if significant change will be required of an organization. As the environment is constantly changing, the vision-mission at the lower levels should be reexamined for (continued) relevancy. A leader should be empowered to



develop and tweak the unit vision-mission statement and model as necessary. Wholesale changes should only result if the mission is no longer relevant. Considerations for developing the vision-mission include the vision of the next level up in the hierarchy; a comprehensive examination of the mission and personnel requirements and their relevancy to the next highest level strategy and vision; and the environment (budget, culture of the organization and of the unit, communication venues, office geography, etc.). In other words, it is quite simply what you wish to achieve (endstate) and the way you aspire to achieve it.

At this point, building the strategy should be relatively simple. Ends, ways, means is an excellent framework for building the strategy. Capabilities within the unit (means) are utilized to conduct operations along identified lines of efforts (ways) in order to support the priorities outlined in the next highest strategy (ends). For instance, EUJ2 uses Analysis and Production, Plans and Operations, Engagement and Integration, and Mission Support as its Lines of Effort. The unit leadership should be responsible for integrating and synchronizing the ways or LOEs in an effort to achieve the strategic ends outlined with the strategy (objectives). Each unit undertakes specific deliverables (tasks, as identified in associated plans) to achieve a prescribed set of conditions or outcomes provided in the strategy as Effects, which are necessary to accomplish each objective. When the ways are identified, risks should be associated with each, along with the prioritization of the objectives and desired effects. This method provides the necessary conduit to communicate and facilitate competency, capability and capacity being retained, improved, and institutionalized, but also enables clear measurability of the strategy and end states. Priorities are set by the Commander's Information Requirements, as reflected in the Commander's Strategy.

Regardless of whether one is at the squadron, group, or headquarter level, the cell, branch, division, or directorate should ensure the integration of the next hierarchy objectives into functional planning, policy, and guidance documents. Additionally, the unit chief should translate these objectives and effects into tasks (METs) into the appropriate Campaign Plan. The METs should be the primary vehicle for implanting this strategy.

The strategy's priorities, objectives, and effects should be assessed quarterly by combining data from the Defense Readiness Reporting System (DRRS) or Status of Resources and Training System (SORTS) and conducting a capability assessment against priority requirements. Quarterly reviews, using systems of records (SORs) will ensure Air Force activities are cohesive and complementary to the objectives outlined in the strategy and to identify information gaps and capability shortfalls for mitigation.

Identified key agents within each unit should lead the organization's efforts to mitigate the gaps and shortfalls identified through assessments and consistently communicate priorities and requirements to external partners and customers using established SORs and processes.

Cabrera asserts that VMCL are the "simple rules" an organization should follow to enhance its success. The VM (vision-mission) statement has already been addressed and is a key part of the strategy development and it serves as an anchor and a tool to build culture. Building C (culture) is the biggest investment for the leader. By developing a culture of strategy through shared language and direction, the unit is able to adjust and adapt easier as it understands what needs to be accomplished. This is where key agents are critical; they help the leader to build the shared culture of strategy competence and capability. Finally, a learning organization will facilitate the emotional foundation for adapting, high morale, and the promotion of a shared culture. The biggest hurdle for any strategy is in its implementation. Cabrera notes that most

organizations fail because they don't deliberately include culture and learning as parts of their strategy implementation plan. From this perspective, VMCL serves as the pillars for strategy development and implementation to enable a successful strategy.

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<sup>1</sup> Marketing research has found that “65% of people are visual learners, 90% of the information that comes to the brain is visual, brain processes visual information 60,000 times faster than text, and presentations with visual aids are 43% more persuasive.” TJ Mc Cue, Why Infographics Rule, *Forbes*, 8 January 2013, accessed 31 March 2018, <https://www.forbes.com/sites/tjmccue/2013/01/08/what-is-an-infographic-and-ways-to-make-it-go-viral/#343efd327272>; “Why Visual Teaching?,” *Visual Teaching Alliance for the Gifted and Talented*, accessed 31 March 2018, <http://visualteachingalliance.com/>; D. R. Vogel, G. W. Dickson, and J. A. Lehman, “Persuasion and the Role of Visual Presentation Support: The UM/3M Study,” June 1986, (Minneapolis: Management Information Systems Research Center, 1986), 21, accessed 31 March 2018, <http://misrc.umn.edu/workingpapers/fullpapers/1986/8611.pdf>; Cabrera, 71; U.S. special Operations command, JSOU-CCE Design for Strategic and Operational Applications Course (AY 2018), (Tampa: Joint Special Operations University, 2018).

<sup>2</sup> For example, in a joint environment the Combatant Command (CCMD) strategy links national strategic guidance to development of CCMD campaign and contingency plans. A CCMD strategy is a broad statement of the Geographic Combatant Commander's long-term vision for the area of responsibility and the Functional Component Commander's long-term vision for the global employment of functional capabilities. The CMD strategy can be further broken down by each subordinate level to develop the needed synergistic outcome of implementing resources in the most efficacious way. JP 3.0, VIII-2.

<sup>3</sup> These simple rules are derived part from Derek Cabrera's Thinking Made Simple and from the EUCOM Intelligence Theater Strategy implementation guidance.

<sup>4</sup> Cabrera, 30.

<sup>5</sup> Undue risk refers to ensuring due diligence has been done in trying to achieve a comprehensive understanding of the operational environment.

<sup>6</sup> A vision-mission is a short statement that incorporates both the vision and the mission. It is an important tool in creating culture and motivating personnel.

<sup>7</sup> Cabrera, 212.

<sup>8</sup> Cabrera, 6-7.

<sup>9</sup> Cabrera, 169-170.

## Chapter 5: Recommendations for Future Research

Studies in business, psychology, and history consistently show that the most successful businesses and people have a strategy. Without one, achievement is left to mere chance. If the Air Force wants to achieve its vision for 2030, there are several areas it will need to address to provide the requisite knowledge and tools to its officers to be successful. Strategic sense and organizational strategy development skills is a learning process. As such, the Air Force should start investing in its officer development from the onset. As the officer track begins with recruitment, an emphasis on trained systems thinkers or those exhibiting natural systems thinking ability would be beneficial to developing future strategists and capable leaders.

One of the most effective ways to ensure synergy and deliberate outcomes is take a building block approach that includes learning and applying strategy at its most basic form and building upon it as one progresses in one's career. The Air Force Education Integration Cell should take the lead in implementing this skillset and ensuring a building block approach from entry (ROTC, Academy, OTS, and even CAP) to War College. Most personnel are already in place, they just need the requisite training. Schoolhouses are already in place, and curriculum just needs to be adjusted. This can be achieved in a semester timeframe with a small cadre of 2-3 people devoted to the curriculum for each schoolhouse. Of note, West Point has already adopted the Systems Thinking Made Simple into its curriculum. The most challenging aspect will be finding the right and enough instructors to teach strategy. One option is for the Strategy staffs from ACSC and War College to teach at CAP, OTS, and SOS as well since they are collocated at Maxwell. ROTC will be the challenge. Perhaps a CBT or VTC type learning environment could be applied in this case.

Myopic thinking of utilizing strategy only in a plans arena will hamper the Air Force in achieving its vision for 2030. It is the combined effort of units (collective behavior) that enables synergy. Key agents must be in place from the tactical to the strategic level. Ideally, each leadership or command position in the organization should be trained in strategy and systems level thinking. However, until then, Directors and Commanders can analyze what key positions in their organizations have the most cross organizational effects and place key agents there. Implementing this line of effort is a low-cost measure with force multiplying effects. Additionally, the incorporation of strategy skills in the OPR will further institutionalize this skillset and provide the necessary mentorship to grow more situationally aware leaders for agile decision making and operations.

A holistic, integrated approach to strategy integration within officer development should be applied to ensure the most optimal development of the strategy skill set. The beauty of these recommendations are that most of the foundations are already in place, it only requires relatively minor adaptation within each functional aspect of strategy within the organization and promises a more agile force and adept leader.

## APPENDIX 1: Know Yourself Baseline Questions

### Know Yourself Baseline Questions

What are the requirements for my mission? Are they still relevant? Are they aligned to higher strategy? (This step is important in order to ensure the unit hasn't stagnated and is producing the desired outcomes, while operating efficiently.)

What are the professional requirements for my people? Which are important for the mission? Which are important for professional development and promotion? What are the personal goals of the people? (Identifying these are a necessary step in integrating ways and means efficiently.)

What are the constraints and restraints associated with these requirements, aspirations, and limitations? (These questions not only identify the boundaries that you must operate within but also integrates the wants to enhance morale and ensure positive progress within the unit.)

What kind of leader am I? How do I need to interact with the team and staff. (Leadership must adapt to the environment and personalities of those that are lead, while capitalizing on strengths and buoying weaknesses to be most effective.)

What are the unit's means? (These not only include material things, but the talent of your people as well as support units.)

\*\*These are sample questions to consider when developing a strategy.

## APPENDIX 2: Test for Effective Mission-Vision Statements

### Test for Effective Mission-Vision Statements:

1. Mission-vision is short and simple
2. Visions capture a picture of a binary future state
3. Visions are intrinsically motivating
4. Missions are simple rules that follow a formula
5. Repeatedly doing your mission should bring about the vision
6. Mission-visions must be measurable
7. Mission moments are rare and precious
8. Mission-visions are mental models, not statements
9. Culture is built on shared, core mental models
10. Learning constantly improves vision, mission, and culture.

Cabrera, 211-212.

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