



# Training the Neglected Core of Army Leadership – Troop-Leading Procedures

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**A**nyone who has served at a mobilization training center (MTC) has probably observed something similar to the following scenario when working with highly cross-leveled Army National Guard or United States Army Reserve units led by inexperienced commanders and/or key leaders:

- ✓ *About 48 hours ago, First Lieutenant Smith looked at his training schedule to confirm that his detachment would conduct a combat patrol convoy and improvised explosive device (IED) defeat training, but failed to clarify the intent, standards of training, and exact start time.*
- ✓ *Two hours prior to commencement of the combat patrol convoy, confusion reigns in the unit, because 20 Soldiers did not receive advance notification of required equipment. Four Soldiers suddenly announce that they have dental appointments.*
- ✓ *Due to an unannounced state dignitary visit, the commander cancelled yesterday's training meeting that was to finalize the unit tactical standing operating procedure (TACSOP) and determine the best unit crew configuration options.*
- ✓ *A platoon sergeant suddenly reports two HMMWVs and an M2 non-mission capable, and the supply sergeant has no crew-served weapon (CSW) blank adaptors for the training.*
- ✓ *The unit arrives on time on Range 29, but at the wrong entrance.*
- ✓ *The executive officer (XO) worked until 0200 to complete 80 percent of an operations order (OPORD)...by herself.*
- ✓ *The same XO answers at least 20 "What's going on?" questions that morning.*
- ✓ *Instead of rehearsing crew drills, a squad leader tells his Soldiers, "You'll find out everything when you get to the lane."*

If the step sequence of these eight shortcomings seems very familiar, congratulate yourself on being one of a minority of military leaders who has memorized and understands troop-leading procedures (TLP). Last year, TLP were cited as a key training focus area for all deploying U.S. units by LTG Russell Honoré, First United States Army commander, in his 20 Absolute Training Rules.<sup>1</sup> TLP get a lot of lip service, but are often considered merely another tool for company-level leaders; the military decision-making process (MDMP) is the related leadership tool for battalions and above.<sup>2</sup> Yet successful, seasoned military leaders at all levels conduct TLP out of habit, keeping their teams informed through warning orders (WARNOs), getting out of the tactical operations center (TOC) to reconnoiter, using the MDMP to complete their plans, etc. TLP are considered *procedures*, and the Army's previous leadership manual (Field Manual [FM] 22-100) cited TLP, but surprisingly and sadly you won't find this word sequence in FM 6-22, the Army's newest leadership manual.<sup>3</sup>

*"To accelerate the transformation of our training...and develop adaptive, multiskilled leaders, we must achieve full-spectrum capability with full-spectrum training."*

General Peter J. Schoomaker  
Chief of Staff, U.S. Army  
"Transformation of Training"  
(9 May 2006) pp. 1-2

The First Army commander is not among those who have left TLP out of their leadership lexicon. He has stipulated that observer-controller/trainers (OC/Ts) at every MTC will supervise to ensure that no collective training occurs until TLP are done to standard.<sup>4</sup> Observer-trainer-mentors (OTMs) ensure that every mobilizing unit that comes through the 181st Infantry Brigade at Fort McCoy, Wisconsin, receives two days

# Report Documentation Page

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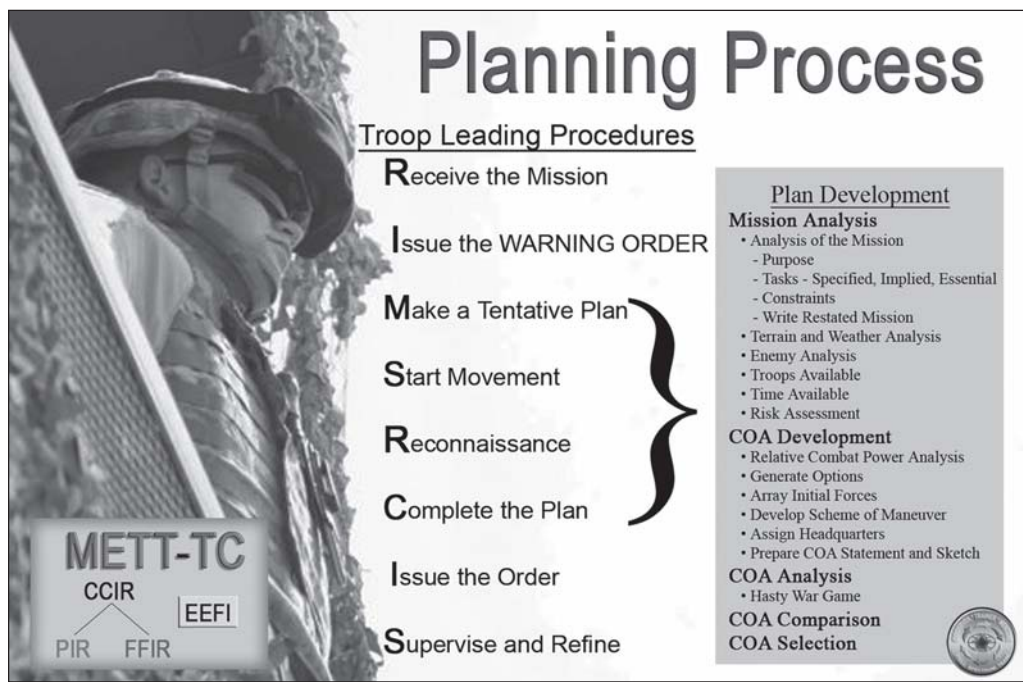


Figure 1

of formal, counterinsurgency (COIN)-based TLP and MDMP instruction. The essence of TLP is shown in Figure 1.

This article addresses the critical need for OTMs during National Guard/Reserve postmobilization training, the key components of a successful program, and a typical day for an OTM. If you are returning from a deployment, you may find your talents ideally suited to be an OTM to instill TLP, lessons learned, and leadership principles in this year's deploying leaders during their postmobilization training.<sup>5</sup>

### Definitions

**Observer-trainer-mentor.** You may never have heard of an OTM, which is not surprising since the authors of this article created the acronym. Unlike OC/Ts—who are responsible for controlling and training Soldiers on specific individual or collective tasks or a specific training event (such as urban operations, hand grenade employment, or an S2 section evaluation during an Army Training and Evaluation Program [ARTEP])—OTMs are experienced leaders assigned to mobilizing units for the duration of their predeployment training cycle to provide mentorship and continuity of assessment. They fulfill the role/need of a higher “chain of command” for independent combat support units when none are present at the MTC. OTMs move beyond the “control” duties of OC/Ts and instill sound daily TLP in units and train leaders *how to think* vs. *what to think*, to prepare them for the nonlinear decisions required in a COIN environment. Since the end of Desert Storm, pin-on time to captain has been reduced by more than 25 percent, resulting in less operational experience for company commanders; OTMs share their years of experience with these young commanders.<sup>6</sup> Prior to deployment, OTMs are also responsible for identifying those few leaders who lack the capacity to lead in combat and train their replacements.

**Troop-leading procedures.** TLP are a sequence of actions that enable the commander or platoon leader to use available time effectively and efficiently in the planning, preparing, executing, and assessing of combat missions; they also assist leaders in making, issuing, and supervising OPORDs. TLP are integrally coupled with the MDMP.<sup>7</sup>

### Mobilization 101

**M**TCS execute required individual and collective Coalition Forces Land Component Command (CFLCC) and United States Army Forces Command (FORSCOM) training to validate units for deployment. For some units, this can exceed 200 tasks.<sup>8</sup> When a unit receives a mobilization order at its home station, commanders are faced with a broad scope of logistics, personnel, Family readiness, and training planning. They are also transitioning and assuming new responsibilities from their handful of “full timer” Active Guard and Reserve staff members.

The unit receives expert guidance from the mobilization assistance team (MAT). In addition, its assigned training support brigade (TSB) provides a unit mobilization assistor (UMA) to work with the unit at home station. The UMA helps the commander understand the mobilization process and tracks administrative and logistical requirements. It is a hectic environment and not a good time or place to learn the basics of team building and neglected TLP. Once the unit arrives at the MTC, UMAs provide the link between the unit and the MAT to address the unit's logistical and administrative needs and to validate that every Soldier achieves the standard in required individual and collective tasks.<sup>9</sup> Training support battalions (TSBNs) provide the OC/Ts to train each of the major training lanes. OTMs complete the picture.

## OTM Evolution

In February 2006, the commander of 2d Brigade, 85th Division (now 181st Infantry Brigade, First Army Division East), and the Fort McCoy installation commander prepared for the influx of separate combat support units and Soldiers and Airmen who would be conducting mobilization readiness training at Fort McCoy in 2006. During a training visit to Camp Shelby, Mississippi earlier that year, the 2d Brigade commander observed how the commander of 4th Battalion, 87th Division, assigned battalion commanders and command sergeants major as “combat counterparts” to train and advise the battalion-level leaders of the 1-34th Brigade Combat Team (BCT) on a daily basis.<sup>10</sup> Upon returning to Fort McCoy, the 2d Brigade commander formed a team of field grade officers and senior noncommissioned officers (NCOs) from the 1st Brigade, 85th Division (Training Support), augmented later by ten recently redeployed Operation Iraqi Freedom (OIF)/Operation Enduring Freedom (OEF) Operation Warrior Trainer (OWT) leaders to train and mentor down to the company level. He added a fourth tier of training support to his existing team concept (see Figure 2):

- MAT/mobilization unit inprocessing center (MUIC) (installation resources, training synchronization, and unit validation)
- TSBns (training lane execution and ARTEPs)
- 181st Infantry Brigade staff (coordinate functional, specialty, and new equipment training).
- The fourth tier of training support would be OTMs who would train leaders in areas such as COIN MDMP, TLP, maintenance management, Uniform Code of Military Justice (UCMJ), time management, why we fight, TACSOP/mission-essential task list (METL) development, and fitness programs.



Figure 2

## OTM Need

BCTs bring their own chain of command for their Soldiers. The missing piece at many MTCs is a chain of influence between the TSB/installation commanders and non-BCT mobilized units. OTM field grade officers and senior NCOs provide the necessary support. In the case of Fort McCoy in 2006, OTMs represented a “higher echelon of command” between separate unit commanders with different needs and issues. OTMs gave the TSB commander and installation commander the eyes and muscle to train and enforce standards.

Accelerated deployment cycles and personnel turnover often lead to increased personnel cross-leveling, which can make it difficult for a commander to build and lead a cohesive unit during the train-up cycle.<sup>11</sup> This is especially true if it is a combat support unit that is not organic to a BCT. Junior commanders in these units are often accustomed to operating relatively independently at their armories without battalion/brigade staff nearby. In the limited time available during weekend battle training assemblies, TLP often take a back seat to the complex individual military occupational specialty (MOS) and specialized schools and training needed in postal, medical, engineer, logistics, signal, and finance units.

National Guard and Reserve Soldiers bring a valuable skill set dimension to COIN operations that the Active Army may not. Civilian skills are often aligned with, and augment, military duties. Moreover, civilian professions often provide a useful common ground with international military or agency counterparts in-theater. The authors of this article are all mobilized reservists and know the value that reservists bring to the fight. However, the mathematical reality of our system is that even the most dedicated reservists usually do not possess the years of day-to-day military experiences that their Active Army peers have. It is a challenge for some leaders to transition from a battle training assembly leader, where informal interactions among all ranks are common, to an Active Army leader who faces tough personnel decisions on a daily basis.

OTMs remind leaders that their Soldiers need leadership vs. “likership.” In addition, many leaders need to let go of linear doctrine and learn new COIN doctrine and terms. OTMs get them up to speed fast on doctrinal changes (to include an acronym primer tool) and expose them to cutting edge knowledge management centers such as the Battle Command Knowledge System (BCKS) and the Center for Army Lessons Learned (CALL). We include leader-based practical exercises in escalation of forces (EOF), cultural negotiations, contemporary leadership challenges, and a full-spectrum staff (and modified company-level) MDMP involving all six lines of effort (LOE) depicted in Figure 3.

If units arriving at MTC McCoy have a low level of physical fitness and weight-control readiness, the OTMs provide nutrition and fitness guidance for the leaders to conduct challenging, safe, battle-focused physical training (PT). Units often increase their average Army Physical Fitness Test (APFT)

scores considerably after implementing the OTM frequency, intensity, type, and time (FITT) exercise program and the First Army tactical foot march requirements.

Deploying National Guard and Reserve officers and senior NCOs at Fort McCoy should know the 8 steps of TLP prior to leader training. (Less-than-successful Reserve unit training experiences primarily stem from lack of TLP knowledge.) In addition, basic command functions that may require OTM training at the MTC include conducting a formal maintenance precombat inspection (PCI), administering an Article 15 hearing, reading a Materiel Condition Status Report, conducting an effective training meeting, and establishing an effective and responsive Prevention of Sexual Harassment (POSH)/Equal Opportunity (EO) program. Since dedicated citizen-Soldiers don't have the benefit of experiencing these events 365 days a year like their Active Army counterparts, OTMs fill these training gaps by going beyond validation requirements—they teach leadership skills for life.

*“We must continually think about the junior commissioned or noncommissioned officer who has to make a huge decision, often with life or death consequences, in the blink of an eye. There is no substitute for flexible, adaptive leadership.”—General David H. Petraeus<sup>12</sup>*

### Launching the OTM Full-Spectrum Team

In March 2006, the OTM officer in charge (OIC) visited the Combined Arms Center (CAC) for a week to learn and implement the latest COIN and full-spectrum leadership doctrine. It was here that the CAC commander, Lieutenant General (now General) David H. Petraeus, instilled the *Engine of Change* concept to train leaders in full-spectrum operations along the six lines of effort shown in Figure 3 and to learn the lessons from an article called “Winning the Peace – the Requirement for Full-Spectrum Operations.”<sup>13</sup> The CAC team advocated training leaders *how to think* vs. *what to think*.

The OTM OIC concluded that OC/Ts are imperative during training events but that OC/T implies “controlling” leaders. Upon completion of “scheduled training” for the day, the OC/T approach is not desirable when leaders take charge of their units and TLP for the next day are just beginning. In discussing leadership, the word “mentoring” is referred to in 25 paragraphs of FM 6-22; OTMs would train and mentor leaders to guide them and let them learn on their own through experience. Certainly a control (or higher command) function

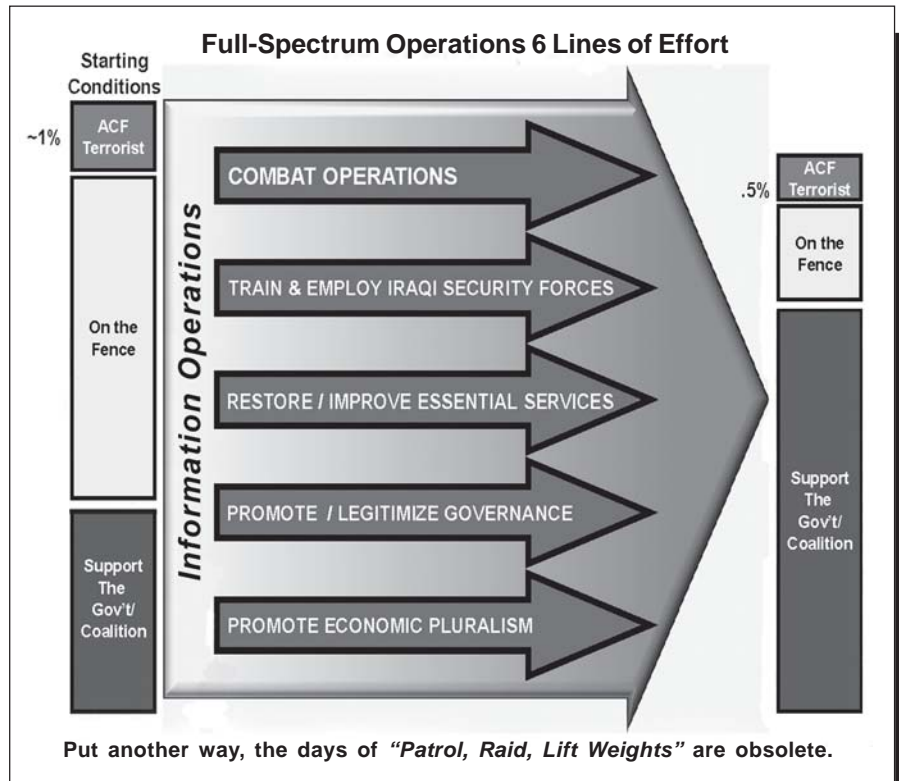


Figure 3

would be an option, but only when critical questioning and suggestions failed. The OTM OIC promised the CAC leaders that “check-the-block” and/or “turn-key” training would not be an option for the OTM full-spectrum team (OTM FST) in training leaders to win.

Napoleon Bonaparte once said, “You can ask me for anything you like, except time.”<sup>14</sup> This applies to good TLP as well as to the fact that the OTM FST had less than a month to prepare before the first units arrived. Within 3 weeks, the basic OTM processes had been developed, a 44-topic leader training program (LTP) had been constructed, the OTM team concept for mobilizing units had been created, and the OTM unit logo had been designed.<sup>15</sup> On 14 March 2006, the OTM FST began training its first unit. From after-action reports (AARs), unit exit surveys, and shared best practices, the OTMs learned how to improve for every mobilizing unit thereafter.<sup>16</sup>

### The OTM Mission

The 181st Infantry Brigade OTM FST ensures that every unit deploying into theater has competent and confident officers and NCOs who know how to lead their Soldiers and win in a COIN environment. The OTM FST executes four key training functions:

- A full-spectrum LTP to train required FORSCOM leader tasks.
- A professional development program (PDP) to train key leader tasks outside of FORSCOM requirements.

OTM Leader Training Program	
<u>Specified Tasks</u>	
(Required FORSCOM Change 8 Leader Training)	
3A - COE/Full-Spectrum Operations/Why We Fight	
3C - Perform Cultural Negotiations	
3E - Lethal/Nonlethal Operations	
3I - Risk Management	
3L - TACSOP Development	
3O - Fitness/Combat Stress	
3S - COIN Fundamentals	
3U - PCC/PCI	
3Z - IPB	
4D1 - TLP/OPORDs	
4D2 - C2 and MDMP	
4D2 - Information Operations	
4D2 - EBO (p61)	
5B5 - Establish Company TOC	
	<u>Brigade Commander Specified Tasks</u>
	1. TLP
	2. OPORDs
	3. Implement EO/POSH Program
	4. AR 15-6/UCMJ Overview
	5. Conduct AARs
	6. Supply/Maintenance Management
	7. Role of Commander/First Sergeant
	8. Tactical Communications
	9. Leader OPSEC Considerations
	10. Rear Detachment Commander/FRG
	11. RSOI OPLAN

Figure 4

- Ongoing coaching and mentorship via embedded OTM teams to build unit TLP and cohesion.
- Unit leadership assessments using the “Big 10” process for the 181st Infantry Brigade commander.

**Leader Training Program.** Within two weeks of unit arrival, the leadership training team conducts the four-day LTP for officers and NCOs in the grade of E8 and above. Concurrently, NCOs in the grade of E4(P) to E7 receive two days of the NCO Leader Training Program (NCOLTP) (taught 100 percent by NCOs!). The LTP covers 17 core leadership topics, and the NCOLTP covers 9 core topics. Figure 4 shows 14 required CFLCC leader training topics along with 11 others directed by the 181st Infantry Brigade commander. The training is heavy on practical exercises and OPORD creation. The OTM has an AAR from every unit, and so far, feedback from units has been extremely positive. Among the most popular blocks of training are “Why We Fight” and “Killology,” which address the “why” of OIF/OEF in a frank manner that is lacking in most training and media channels. Figure 5 depicts the full training list offered by the OTM FST.

**Professional Development Program.** The 21 topics in the PDP (Figure 5) are “electives” that most unit leaders need refresher training in. These hands-on topics are trained during the last day of the LTP, as selected by each unit commander, and trained at the unit during rare “open” unit training time periods. Generally, once a unit tried one PDP course, other PDPs would follow. The commander of the 395th Finance Battalion scheduled his leaders for virtually every PDP during his unit training time.<sup>17</sup>

**Team Program.** A field grade officer and senior NCO are assigned to OTM up to three mobilizing units for the duration of a unit’s predeployment training cycle. We prefer that OTMs

cover multiple units, since we believe that a “24/7” presence stifles unit leader growth and their ability to take charge.<sup>18</sup> FM 6-22 states that the Army relies on “mentorship” as a leader development system that compresses and accelerates development of professional expertise, maturity, and conceptual and team-building skills.<sup>19</sup> The short mobilization cycle is compressed to say the least!

Figure 6, page 12, depicts the 20 primary duties of an OTM team with a unit. Being an effective OTM starts with training and enforcing the First Army commander’s 20 Absolute Training Rules which specify, among other things, that units will execute TLP with daily precombat checks (PCCs), risk assessments, and OPORDs. They also engage in critical questioning, coaching, and sharing of their recent OIF/OEF experience. OTMs also share more than 54 leader tools ranging from PCC/PCI checklists to leader book inserts. One example in our “OTM Tool Kit” is the checklist of subjects to cover during a relief-in-place (RIP)/transfer-of-authority (TOA) video-conference (VTC) (Figure 7, page 13).

**Big 10 Assessment Program.** Every 48 hours, the OTM team compiles a unit leadership assessment, known as the “Big 10” evaluation, to assess and track unit leadership progress. OTMs counsel unit leaders and the results are briefed to the TSB commander at the weekly “Eagles Call” briefs. Commanders sequentially brief status and improvement plans and learn from (and amidst) their peers in a heightened “command and staff” environment. The first five of the Big 10 criteria are derived from TLP, while the last five are more specific to unit cohesion, safety, and fitness.<sup>20</sup> Units are rated from 1 to 5 with “1” being the lowest. A “4” indicates that the unit is fully proficient in the tasks. A “5” indicates that subordinate leaders are also fully proficient, and the unit executes above standard in these areas even in the absence of the commander and noncommissioned officer in charge (NCOIC). The unit progress is tracked and the unit is classified *green*, *amber*, or *red* accordingly. Figure 8, page 14, depicts an example of a Big 10 Progress Track and Figure 9, page 14, shows a sample of a Big 10 Daily Assessment.<sup>21</sup>

### TLP Notes, Quotes, and Comments

**R**eceive the mission. Too often, leaders do not receive or clearly understand all five “Ws.” Insist on it, particularly the “Why,” which helps clarify effects and commander’s intent. Get the desired end state.

**Issue a Warning Order.** How many AARs in the history of the Army have started with “We need to communicate better.” Well, it starts here. Don’t wait until you have all the facts—get word out to your Soldiers so they can get moving on steps 4 and 8. One unit posted signs all over its TOC that read, “Who else needs to know!”

## Sample OTM Leadership Team – “Full-Spectrum” Training Program

<u>Leadership Training Program (LTP) for E8 and Up</u>	<u>Battalion</u>	<u>Company/Detachment</u>
1. LTP Introduction	X	X
2. OTM Overview/OIF Theater Update (1.0 hr)	X	X
3. Why We Fight/Killology (1.5 hr)	X	X
4. OPORDs/Problem Solving/Leadership Tools (2.0 hr)	X	X
5. Troop-Leading Procedures (3.5 hr)	X	
6. COIN Military Decision-Making Process (4.0 hr)	X	
7. Award/Officer Efficiency Report (OER)/NCO Efficiency Report (NCOER) Updates (1.0 hr)	X	X
8. Casualty Administration and Reporting Procedures (1.0 hr)	X	X
9. Command Philosophy/Developmental Counseling (1.0 hr)	X	X
10. Article 15-6/EO/POSH Leader Issues (1.5)	X	X
11. Implementing a Fitness/Nutrition Program (1.5 hr)	X	X
12. Contemporary Operating Environment (COE)/FM 3.0 new 2006/ FM 7.1/Terms/Effects-Based Operations (EBO) (1.0 hr)	X	X
13. COIN/Full-Spectrum Operations (6 lines) (1.5 hr)	X	X
14. Intelligence Preparation of the Battlefield (1.0 hr)	X	X
15. Conducting Training Meetings (1.0 hr)	X	
16. Conducting an AAR (1.0 hr)	X	X
17. Cultural Negotiations for Leaders (1.5 hr)	X	X
18. EOF, IED Defeat Basics, and OIF Operations Q&A (2.0 hr)	X	X
19. Safety – Risk Management and Assessments (1.0 hr)	X	X
20. SOP and METL Development (1.0 hr)	X	X
21. Maintenance/Supply Management for Leaders (1.0 hr)	X	X
 <b><u>Professional Development Training (PDT) – Additional Optional Leader Training</u></b>		
1. Operational Terms, Graphics, and Symbols (1.5 hr)	X	X
2. Role of the Commander/XO/1SG/PSG (1.0 hr)	X	
3. Developing a Command Philosophy and Vision	X	X
4. Microsoft Office Techniques and Tips (1.0 hr)	X	X
5. Weapons of Mass Destruction (WMD)/Bioterrorism Primer (1.5 hr)	X	X
6. Establishing a Company TOC (1.0 hr)	X	
7. Financial Readiness for Leaders (1.0 hr)	X	X
8. Army Command and Control (C2) Digital Systems (1.0 hr)	X	X
9. Combat Support Overview (1.0 hr)		X
10. Traditional Customs and Courtesies of the Service (1.0 hr)	X	X
11. Tactical Communications Techniques and Joint Network Node (JNN) (1.0 hr)	X	X
12. Motivating Soldiers (1.0 hr)	X	X
13. IED Defeat MDMP/Earthmoving Fundamentals (2.0 hr)	X	X
14. Joint Operations Overview	X	
15. Blue Force Tracker	X	X
16. Language Lab	X	X
17. “Why We Fight” Movie Series (History Channel)	X	X
18. JAG Q&A 2-6445 (ROE, EOF, Article 15-6, SH, EO, Misc.)	X	X
 <b><u>NCO Leader Training Program (NCOLTP)</u></b>		
1. Conducting PCI/PCC (2.0 hr)		
2. Implementing a PT Program (1.5 hr)		
3. Risk Assessment (1.0 hr)		
4. CASEVAC/Medical Evacuation (MEDEVAC) for Leaders (1.0 hr)		
5. Section/Squad TLP/MDMP/OPORDs (3.5 hr)		
6. Conducting Training and AAR to Standard (1.0 hr)		
7. NCOERS/Counseling Subordinates, and Leader Books (2.0 hr)		
8. Conducting a Platoon Training Meeting (1.0 hr)		
9. EOF/Counter RCIED (Remote-Control Improvised Explosive Device) Electronic Warfare (CREW)/OIF Operations Q&A (2.0 hrs)		

**Figure 5**

**Make a Tentative Plan.** This is the Army’s 7-step problem-solving process, starting with “Determine the best way to (insert mission here).” Experienced NCOs provide some great courses of action—if they are involved and are asked. Get solid facts and intelligence preparation of the battlefield (IPB) and use pattern analysis to help with assumptions. This step is where leaders step away from their “checklists on what to think” and develop courses of action that incorporate lethal and nonlethal means. As one COIN expert stated, “Counterinsurgency requires an excruciatingly fine calibration of lethal force. Not enough of it means you will cede the offensive to your enemy, yet too much means you will alienate the noncombatants whose support you need.”<sup>22</sup>

**Start Necessary Movement.** Preventive maintenance checks and services (PMCS), risk assessments, and PCC are part of movement, and every first-line supervisor needs to conduct them. Getting smart on something falls in this category as well. If you are a Level I medical unit and there may be some Level II operations involved, read the FMs to get smart fast.

**Reconnoiter.** Officers must get out in their area of operation to know what’s going on externally. Let NCOs run the unit. Human intelligence is key in COIN reconnaissance. Management is about the present—the “What” and “How.” Leadership is about the future—the “Why,” “When,” and “Where.”<sup>23</sup> Get out and lead.

**Complete the Plan.** This does not mean sending out 20 e-mail messages helter-skelter. The Army has a knowledge management tool to transform information into a concise, usable, value-added product—it’s called an OPORD, and good units use it consistently.

- Don’t—
  - Create a book; use graphics vs. words for your scheme of maneuver.
  - Include TACSOP items in your OPORD; that information is already known.
  - Regurgitate the higher order. Omit fluff and anything not related to your area of operation.
- Do—
  - Give your subordinate elements their own individual mission statements in the Concept of Operations-Maneuver paragraph (3.a.1).<sup>24</sup>
  - Include a timeline and phases.
  - Address all six full-spectrum lines of effort.
  - Nail down implied tasks in tasks to maneuver units (pin the rose on one element) or coordinating instructions (most/all elements).

### Sample of OTM Team Duties and Unit Mentorship Training Program

1. Establish presence at key meetings and act as a “sounding board” and mentor for leaders.
2. Train and evaluate TLP: PCC/PCI, MDMP, risk, OPORDs.
3. Assist unit with battle-focused PT program: three ruck marches and two APFTs.
4. Mentor leaders and act as higher command as required (simulated higher chain) to enhance readiness.
5. Share tools and best practices. Provide OTM CD set of all LTP topics and latest TTP and graphic training aids (GTAs).
6. Complete 4-page checklist and initial assessment with commander (SARC, UMO, rear detachment).
7. Help develop unit RSOI OPORD.
8. Assist with building leadership teams, Individual Ready Reserve (IRR) Soldier integration, and command climate.
9. Enforce maintenance PCI, weapons discipline, and safety.
10. Share CSW PCI and individual weapons qualification (IWQ) PMI improvement technique.
11. Train unit in home station multipliers (rear detachment, HTN, Family Readiness Group (FRG), newsletter).
12. Help create FRG video presentation of your unit’s training.
13. Assist with revised TACSOP/METL implementation.
14. Identify training issues with commanders 96 hours out; provide UTT Professional Training.
15. Help facilitate ongoing contact with parent and RIP/TOA units (e-mail and VTC).
16. Be the link between your unit and brigade commander (the UA to the MAT is your link to installation).
17. Conduct weekly AARs for the brigade command sergeant major to identify MTC issues.
18. Assess unit leadership/training progress 3 times a week via Big 10 Evaluations.
19. Brief weekly Big 10 status to brigade commander; address leadership progress/issues.
20. Have unit assess effectiveness of OTM program through unit closeout survey.

**Figure 6**

- Involve the XO, first sergeant, and supply sergeant in Paragraph 4.

**Issue the Order.** This means verbally, at a battle update briefing (BUB), or via a command post of the future (CPOF) icon. Have different people brief it. Use visuals and use the brief-back technique. Invite support personnel.

**Supervise/Rehearse**

- PCI are leader responsibilities to spot-check PCC.
- Don’t just visually inspect; ask questions concerning each Soldier mission, TACSOP, etc., to check mental readiness and confirm information flow.
- Ask hypothetical questions requiring thought (for example, execute a casualty evacuation [CASEVAC], intelligence spot report, or rules of engagement [ROE] decision).
- Mix different *conditions* into rehearsals. The task and standards may stay the same, but vary the conditions (for example, presence of civilians on the battlefield [COB], media, and/or Iraqi Security Force [ISF]).



## Sample of OTM Subjects for Mobilizing Unit to Cover With RIP/TOA Unit

### Commander Subjects:

1. Organizational chart/contact information for military, nongovernment organizations (NGOs), ISF, mayors, etc.
2. Mission-specific requirements/trends/TTP/local EOF policy.
3. Verbatim copy of unit's mission (written at the battalion-level or higher).
4. Task organization. How did their unit change, and what caused the change?
5. Mistakes made in the first 60 days. How did your unit take casualties?
6. Most dangerous enemy course of action for mission/CSS scenario.
7. Past Article 15-6 investigations (point of contact [POC] for legal/UCMJ actions, past and pending).
8. Welcome packet, including map and POCs for the FOB you are going to.
9. Most common 25 – 50 Arabic phrases (with correct dialect) used in your job.
10. Top 5 recommendations of things to do more of during UTT.

### NCOIC Subjects:

1. RIP/TOA ceremony setup.
2. APFT site – previous trends and recommendations.
3. Medical support – POC list for previously used facilities.
4. Leave and pass procedures; forms required; Red Cross message chain of events.
5. Housing issues/mess facilities/morale, welfare, and recreation (MWR) facilities/church services.
6. Memorial service set-up/commo black-out procedures.
7. Maintenance requirements/additional assets available.
8. Finance support (usually home state offers best help).
9. Promotions, reenlistments, and schools in-theater.
10. Uniform, safety, Army warrior training (AWT) (formerly weapons tactics trainer [WTT] and common task testing [CTT]) policies.

### Staff Subjects:

1. Graphic layout of the TOC – try to mirror conditions during your ARTEP.
2. Higher locations and POCs for direct support (DS)/general support (GS) maintenance, personnel actions, and logistics.
3. POC for maintenance assets, such as transportation management plan (TMP) NODs, weapons, BFT, Warlock, ASIPS.
4. Container express (military shipping container) (CONEX) movement timeline, in and out, and POC for customs officials.
5. Key schools and training to be completed prior to arrival.
6. Required and recommended training while in-theater or reception, staging, onward-movement, and integration (RSOI).
7. Computer access and tech support availability, commo fill procedures weekly/time of key change/who provides fill.
8. Personal and vehicle tracking procedures, FOB Base Defense Plan, and POCs.
9. SIR procedure and information flow.
10. Host nation support provided.

Figure 7

## A Day as an OTM

**W**hat might a typical day look like for an OTM team assigned to cover three units during peak cycle?

**0600** – Meet Unit X leaders to ensure that they have completed a proper risk assessment with the latest hazards and controls for the day's training. Spot-check equipment and Soldiers preparing to conduct a 5-mile road march; on this day, only four out of six know the top risks and countermeasures, and 20 percent fail to meet the proper uniform standard. The chain of command, not the OTM, corrects the faults, and the unit makes their SP.

**0700** – Meet the Unit Z leader conducting PT, check the Soldiers again, and coach them on fitness techniques. Stop unit training after noticing that they didn't take enough time for some of the Soldiers in their unit to stretch. Ensure that weapons are 100 percent integrated into battle-focused PT training.

**0745** – Meet Unit Y leaders after combatives training for the same PCC/PCI purpose. Listen to and advise the unit commander about a tough personnel decision being considered.

**0900** – Attend the mobilization synchronization meeting (sync meeting) with the UMAs assigned to each unit. Work with our OTM MAT liaison officer to ensure that training for the next week is properly scheduled for each of their units.

**1100** – Meet Unit Y at urban operations training and help share some TTP on training Soldiers on some TTP learned in Iraq. Ensure that the NCOs check to see if their Soldiers are properly clearing their M4 weapons at a clearing barrel.

**1200** – The OTM officer shares a meal, ready to eat (MRE) with the Unit X commander and explains how to complete an Article 15-6 investigation concerning a blank negligent discharge incident. Query the commander on plans for Soldier and unit corrective training and pin down the commander on when he personally will address the entire unit on the severity

of this kind of incident. Discuss other issues with him that are “keeping him up at night.”

**1300** – The OTM NCO heads over to the NCOLTP as an instructor to train 60 NCOs from three different units in leader CASEVAC procedures and how to write an OPORD that focuses on getting leaders to identify implied, and not just specified, tasks. Finish with a hands-on practical exercise in the forward operating base (FOB).

**1300** – The OTM officer reports as the assistant instructor at LTP for teaching junior officers the roles and responsibilities of an NCO and coaching them on counseling procedures. He gives two real-life OEF examples that he faced, which generates a 20-minute discussion on alternate courses of action.

**1430** – Document and complete all three “Big 10” evaluations and stop by the OTM TOC to update the section OIC on the leadership status of units and get further guidance. Lieutenant colonel OTMs work primarily with battalions and staffs, but add support to their five OTM teams as needed.

**1600** – Attend brigade commander’s weekly “Eagles Call” meeting for two of his commanders. Mentor the Unit Z commander prior to the meeting on his “Big 10” evaluation, obtain his improvement plan, and rehearse his briefing. Meet afterwards with the Unit X commander and first sergeant to review their performance and discuss how to improve their military briefing style.

**1730** – Go back to one or all of the units to conduct an AAR of training for the week. Hear the Unit X OPORD brief at their BUB; interject some brief-back questions to break the silence at the end.

**1900** – Attend a unit training meeting and share observations with unit leaders. OTMs are included in the unit BUB agenda right before the NCOIC and commander. The OTM conducts

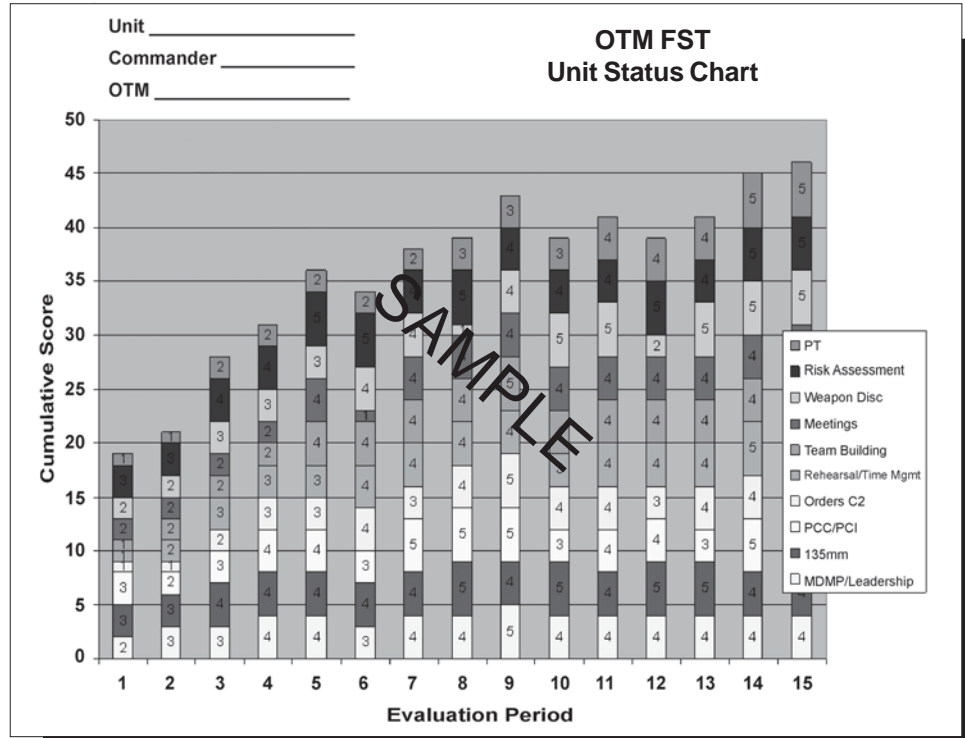


Figure 8

the biweekly 15 minutes of officer professional development (OPD)/NCO professional development (NCOPD) for the unit. Today’s topic is “Improving Family Readiness Group Operations” and sharing the Top 10 questions to ask at tomorrow’s VTC with their RIP/TOA unit. Praise the 1st Platoon leader for his conduct of realistic EOF rehearsals.

OTM FST Unit Status Chart		
Big 10	Grade (1-5)	Comments
MDMP/Leadership	3	Disconnect within squad leaders on executing commander’s intent for UTT WTT tasks—commander AAR corrected
135 mm	2	Good DA 2406 maintenance tracking process. One team ate in the dining facility (DFAC), in spite of being directed to eat in the FOB (27 Sep)
PCC/PCI	4	100% of spot-checked Soldiers had DA 1156, media rules, Soldier rules, dog tags; 80% had leader books.
Orders/C2	2	Unit failed to issue WARNO, and only issued paragraph 2 during base defense
Rehearsals/Time Management	4	Conducting rehearsals using FOB sand table. Unit was on time for every training event over the past week.
Team Building	3	1SG taking more of a lead, because the commander is now allowing him to run individual training. Climate survey for 8 Nov.
Training/CUB Meetings	4	Best BUB to date (20 Oct) with XO running meeting and succinct information presented to the commander.
Weapons Discipline	2	Three observed incidents of muzzle awareness “flashing” of other Soldiers; 80% of the weapons were cleaned and inspected.
Risk Assessments	5	RA added three hazards/countermeasures for cold; there was 100% Soldier implementation; a 2d pair of socks was part of the SOP.
Physical Fitness	4	92% pass rate, up from a 64% pass rate on the first test. Score average up from 220 to 250.
Fully capable of executing mission in-theater		No issues preventing attainment of green status
		Major leadership/training issues—no improvement

Figure 9

**2000** – Grade and prepare findings for the Unit Y Command Climate Survey that it initiated last week. One of the platoon leaders excels at automation but does not appear to have the skill set to lead Soldiers effectively. He has not improved with mentoring, and the survey bears out this observation. Begin preparing a draft letter of recommendation for the brigade commander to reassign him to a staff job.

**2100** – Check e-mail, and check out a route clearance article as requested by a platoon sergeant on the BCKS at <<https://bcks.army.mil>>. Conduct personal PCI prepared for the next day, and do everything possible to help Soldiers survive and win in a full-spectrum COIN environment.

## Conclusion

**T**he 181st Infantry Brigade OTM LTP was reviewed by the First Army commander in the summer of 2006. He designated the OTM FST to mail disk copies of the OTM TACSOP and training presentations/practical exercises to every mobilization station in the United States. Short of deploying to win the War on Terrorism, there may not be a more important mission than training Soldiers to win in a full-spectrum environment. OTMs are always enforcing theater immersion by enforcing and sharing the words of deployed leaders like the NCOIC of the deployed Brigade Support Battalion of the 1-34th Brigade Combat Team, who wrote: “Keep telling your Soldiers out there that TLP, PCC, PCI, and wearing all of their protective gear is imperative for their survival. We have had so many Soldiers walk away from their ruined vehicles with nothing more than an exciting story, due to their safety equipment. It is heavy and uncomfortable but sure beats dying.”<sup>25</sup>

We will, sergeant major, and we will “Train to Win.”



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*Major Sierakowski is the primary instructor for the OTM Leadership Training Program. He is a signal officer and Opposing Force (OPFOR) subject matter expert with more than 21 years of National Guard and Reserve experience, to include membership on the Army National Guard Biathlon Team. He works as a civil engineer for Ciorba Group, Inc., in Illinois.*

*Major Holden was the executive officer of the OTM Leader Training Program for most of 2006. He is an air defense artillery officer with more than 23 years of service. He served as a senior MiTT Leader during OIF II/OIF III from 2004-05.*

*Sergeant Major Laudonio is the NCOIC of the Mobilization Assistance Team at Fort McCoy, Wisconsin. He has served more than 30 years in the Army and has completed four OIF/OEF tours, including Iraq; Afghanistan; Guantanamo Bay, Cuba; and Eastern Europe. His most recent experience in Iraq was with a transportation company, which logged more than one million miles driving throughout Iraq.*

## Endnotes

<sup>1</sup> Major General Russel L Honoré, First Army OC/T Leaderbook, Rules #5 and #6, 30 October 2006.

<sup>2</sup> FM 22-100, *Army Leadership*, 31 August 1999, paragraph 2-114. During tactical operations, decision making and planning are enhanced by two methodologies: the MDMP and the TLP. Battalion and higher echelons follow the MDMP. Company and lower echelons follow the TLP.

<sup>3</sup> FM 6-22, *Army Leadership (Competent, Confident, and Agile)* dated October 2006. Many Army publications are not lacking in training TLP. For those who want to dig deep into TLP, FM 3-21.9, *Tactical Employment of Antiarmor Platoons and Companies*, is a sound example of breaking down of TLP.

<sup>4</sup> First Army OC/T Leaderbook, Rules #5 and #6.

<sup>5</sup> National Guard and Reserve soldiers returning from OIF/OEF can join the Operation Warrior Trainer (OWT) Program and serve on active duty an additional 12 months at an MTC to share their knowledge and TTP. <<http://www.first.army.mil/owt.htm>>.

<sup>6</sup> Brigadier Nigel R.F. Aylwin-Foster, “Changing the Army for Counterinsurgency Operations,” *Military Review*, November-December 2005, pages 2-15.

<sup>7</sup> FM 3-21-91, Section II, Paragraph 2-7. Specific steps of the MDMP help coordinate staff and commander responsibilities. The company commander and platoon leader have subordinate leaders, but not a staff, which places the burden of planning on their shoulders. TLP reflect this reality while incorporating the spirit, language, and general process of the MDMP to assist in the preparation of an OPORD.

<sup>8</sup> OIF Change 8 to FORSCOM Regulation, March 2006.

<sup>9</sup> The installation and TSB commander will not validate a deploying unit until requirements are met.

<sup>10</sup> The 4th Brigade, 87th Division, commander implemented his combat counterpart program in the Fall of 2005, using his TSBn commanders and command sergeants major as the “OTMs.” assigned at battalion level for the six battalions of the 1-34th BCT. Special thanks to the 1-167 RSTA Squadron, who demonstrated outstanding MDMP/TLP and painted an example of what right looks like.

<sup>11</sup> At least 8 of the 96 units that trained and deployed from Fort McCoy in 2007 were over 50 percent cross-leveled according to MTC McCoy MAT BUB charts, to include a unit with members from more than 30 different states.

<sup>12</sup> LTG David H. Petraeus, "Learning Counterinsurgency: Observations from Soldiering in Iraq," *Military Review*, January-February 2006, pages 2-12.

<sup>13</sup> MG Peter Chiarelli and MAJ Patrick Michaelis, "Winning the Peace – The Requirement for Full-spectrum Operations," *Military Review*, July-August 2005, pages 4-17. <<http://www.au.af.mil/au/awc/awcgate/milreview/chiarelli.pdf>>. Accessed 26 April 2007.

<sup>14</sup> The Lessons of History, <<http://www.mackenzieinstitute.com/1998/newsletter070198.htm>>.

<sup>15</sup> OTM Full-Spectrum Team Logo created by MAJ David Sierakowski, March 2006 (see page 6.)

<sup>16</sup> The 4th Cavalry Brigade played a large role in augmenting the 181st Infantry Brigade training efforts during the peak mobilization season in 2006 by assuming several training lanes and providing OTMs for three engineer battalions. They developed the concept of the "Big 8" evaluation criteria, which were revised into the "Big 10" criteria depicted in the article.

<sup>17</sup> The commander of the 395th Finance Battalion helped validate almost every PDP topic with great AAR feedback.

<sup>18</sup> Remember when you were a young leader. Was your commander there 24/7; or instead, did he/she let you learn mainly from your NCOs and make some mistakes in private?

<sup>19</sup> FM 6-22.

<sup>20</sup> 4th Cavalry Brigade's "Big 8" Assessment Tool was the forerunner of the 181st Infantry Brigade's "Big 10."

<sup>21</sup> 135MM = Class I, III, V and Maintenance and Movement.

<sup>22</sup> Major John Nagl, "The Counterinsurgent," *New York Times Magazine*, January 11, 2004, page 7.

<sup>23</sup> Hans Finzel, *Top 10 Mistakes Leaders Make*, Wheaton, Illinois: Victor Books, 1994.

<sup>24</sup> FM 7-10, page 44; "Maneuver: Address each subordinate element by name and give them their mission statement."

<sup>25</sup> The commander or the BSB, 1-34th BCT, and the commander of the 1-167th RSTA Squadron have sent 1st Brigade, 85th Division, leaders numerous lessons learned and exemplify the "full-spectrum operations" in their newsletters at <<http://www.redbullweb.com/24.html>> and <<http://www.neguard.com/UNITS/1-167cav/index.htm>>.