

Notes from the Field

The Joint Force engages in valuable activities and learns valuable lessons and makes valuable insights on a daily basis. Unfortunately, many of those lessons and insights go unstated and unshared because of the Force's intense battle rhythm. Notes from the Field aims to address that problem by giving the Joint Force a place to reflect, record, and report some of those ideas and insights. Campaigning encourages anyone in the Joint Force who encounters something in their day-to-day work that they believe is important to share their thoughts. If a reader thinks it's important, so does Campaigning.

The Three Lifelines of a Planner

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A great listener – that was my talent!—Regis Philbin

In the summer of 1999, Regis Philbin stormed the game show world with the premiere of Who Wants to Be a Millionaire. The show invited contestants to play the game by inviting them to the hot seat. A contestant answers a series of questions that increase in difficulty as the rewards for a correct answer increase. Contestants who answer all fifteen questions correctly win a million dollars. The seat lived up to its name quite literally with all the lights, but in a more figurative sense, its heat came from the attention of millions of viewers. Leading a planning group is something like a hot seat—lots of viewers hanging on your answers.

The game created drama by offering contestants the ability to use lifelines of three varieties. A contestant could phone a friend, poll the audience, or ask for a 50:50, where two of the four multiple-choice answers are removed, leaving one of the two remaining choices as the correct answer. Using a lifeline increased a contestant's odds of success. While, admittedly, running a planning team at the operational and strategic echelons isn't the same as appearing on a network primetime television show, leadership positions are in something of a hot seat. Leaders don't always have the answers, but they do have lifelines.

Ask the Audience: One of the most straightforward tools to employ as a planning team lead is simply asking members of the planning team for their informed opinions on a topic. However, as leaders plan at the operational and strategic levels, individuals tend to have disparate and conflicting opinions of what the right answer might be. Just as in the game show, while the majority is often right, as the questions become more difficult the person in the hot seat needs to guard against presuming the majority is right. Planning leads should take appropriate measures when polling the staff or other partners to ensure the solution doesn't always come from the loudest or most ardent voice in the room. Red Team techniques, such as dot voting or circle of voices, can ensure that all team members have their voices heard. As one speaker noted, asking

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the audience offers the opportunity to ensure communication is effective. “If the message is sent but not yet received or not interpreted, not understood that presents its own set of challenges,” and asking direct questions offers the opportunity to require reciprocity in terms of communication.

Planning teams at the operational and strategic echelons often have diverse perspectives on approaching and solving a problem. When polling the group, considering how other partners or agencies such as State, USAID, Treasury, or Homeland Defense think about a problem can guide the planning team leader to the best solution. At a minimum, asking for their respective thoughts broadens and enriches the dialogue. Of course, in the hot seat, no matter the poll result, the planning team lead is responsible for deciding on the final answer.

Phone a Friend: Occasionally, the subject matter expert isn’t in the room. The ability to phone a friend to seek advice comes from years, if not decades of reputation building and relationship forming. Planning team leads should already have their own informal network of peers they can call from when sitting in the hot seat. Contestants in the hot seat called people they knew and trusted: parents, siblings, long term friends. For military planning team leads the relationships might be familial, but more likely they trace to time as cadet in an academy or ROTC or the officer basic course. Deep trust and deep relationships are forged in the crucible of the work in the profession, such as on a military staff as a junior officer. Further, before jumping into the hot seat, officers should assess whether they have generated the social capital throughout their career and leverage it when in the hot seat. Even more so, “it’s amazing how sometimes somebody has a piece of information,” and just reaching out to them builds a more complete understanding.

More than seeking advice from a peer, there are times when a planning team lead should pick up the phone and ask for advice from higher or lower levels. It can be difficult to use this lifeline, but eventually leaders realize that everyone else is just as clueless. Phoning the point of contact (POC) on the bottom of a joint staff PLANORD can reduce much of the fog and friction within a planning effort. Talking through the problem and understanding the thoughts behind higher-level orders is paramount to successful planning. On a similar note, subject matter experts often reside in lower planning echelons. Planners on a combatant command planning team should have navy, army, air, and space component planners and other civilian agency partners on speed dial to help develop and write plans and orders for operations in the maritime domain, for instance. Often, a lower echelon can tell you exactly what you need to tell them. Beyond some of the obvious organizational echelons, one speaker noted that their planning team had a list of specific experts. “Those SMEs you have to pull in as needed are developed through networking early on, and having your list of SMEs to go through by division and specialty. They will make it that much easier when you have to pull someone in to adjust. We kept a running list of points of contact for each.”

Calling a friend doesn’t always mean another uniformed officer. Often, the problems planning teams face need other government agencies involved to address the problem. Phoning a friend might be speaking to a colleague in the State Department to confirm overflight and transit rights. Other times it might be talking to a contact at USAID to coordinate airlift to deliver and distribute humanitarian aid. As officers rise in rank, responsibility, and echelon, creating and

cultivating relationships outside of the military may become even more useful than the relationships with those in uniform. And lawyers, keep them close. As one speaker noted: “Invite your [command] lawyers. Pretty, pretty savvy people, and you will learn some lessons along the way in terms of framing the deliverable.”

50:50: The ability of a planning team lead to approach senior leaders and have candid discussions on the issues at hand is a key personal skill. Approaching a senior leader, often a flag officer, to receive guidance and narrow options is tantamount to the 50:50 in the gameshow. Often, a senior leader can help by providing refined direction, eliminating some of the options a planning team had under consideration. Narrowing options saves time and leaves the staff to focus on other feasible options or courses of action more likely to pass muster because of greater refinement and detail. Planning team leads should not avoid seeking guidance from senior leaders nor consider it a weakness. Unlike the gameshow, the answers are not facts, fixed and predetermined. Planning at the operational and strategic level is a dynamic activity, and planning team leads must incessantly seek out the most current and relevant guidance.

Like phoning a friend and asking the audience, discussing options with civilian counterparts can help discern which options are feasible and which options should be disposed of. State Department representatives can tell a planner if other nations will support a COA or exercise veto power by denying specific authorities, and the Federal Emergency Management Agency (FEMA) representative can help predict the capabilities local authorities will need to assist the public following a national disaster. Under the right circumstances the 50:50 may be asking leadership to refine guidance or intervene. A speaker recalled a specific instance that new JPGs might have resisted out of fear of appearing incompetent or inadequate. The speaker encouraged leaders to overcome their fear, “push that up if it’s a high enough priority. We actually drafted a letter, sent it all the way through to the Pentagon. It went all the way up to the NSC. We got a directive directing interagency support.”

Win the Million Dollars: While leading a planning team won’t make someone rich, it will lead to high pressure situations with lots of pressure akin to the hot seat. More often than not, it involves leading peers, civilians from other agencies, and—at times—leaders senior in rank. Accordingly, leading planning teams at the operational and strategic levels necessitates employing different leadership skills. Planning team leads must apply the collective wisdom of their planning team, possess the ability to seek out the right experts, and facilitate dialog with senior leaders across the government. Indeed, planning team leaders should understand that lifelines are crucial to success. Even though the million dollars eludes those who pursue a career of service, it does offer the chance to use lifelines more than once.