

The Chief's Toolbox: The Art and Methods of Leading a Productive Staff

by COL Andy Morgado

Army Field Manual (FM) 6-0, *Commander and Staff Organization and Operations*, identifies the chief of staff as the commander's principal assistant responsible for coordinating and directing the work of the staff, and for establishing and monitoring the battle rhythm.¹ As in most doctrinal manuals, the science is often clear, but the art of application sometimes leaves much to the imagination. This is clearly my perception of the chief of staff position, a role I performed at the two- and three-star level commands (a division and field army). I also served as assistant to the chief of staff at a four-star major command.

The chief of staff position is the fulcrum or nexus of action on the staff, empowered to translate the commander's directions and intent into action and achieve results. Doctrine assigns roles and responsibilities, but the practical means of governing action, processing information and appreciating the context for action required at any level of command lack precise definition. This article serves as a practitioner's guide for chiefs of staff and executive officers who must interpret doctrine and employ the resources available to accomplish the mission. This is simply one practitioner's perspective and is given with the hope that others may learn from the

trials, errors and successes of another to apply to their given circumstances.

Role of integration

The chief of staff's role is primarily one of integration. The chief of staff brings multiple people, tasks, efforts and functions together to solve problems and produce results.

The commander is ultimately responsible for organizing and training the staff, driving the operations process, building and maintaining situational understanding and solving problems.² However, the chief of staff is the person who brings it all together, finding the ways and means to attain the desired ends. Doctrine provides many

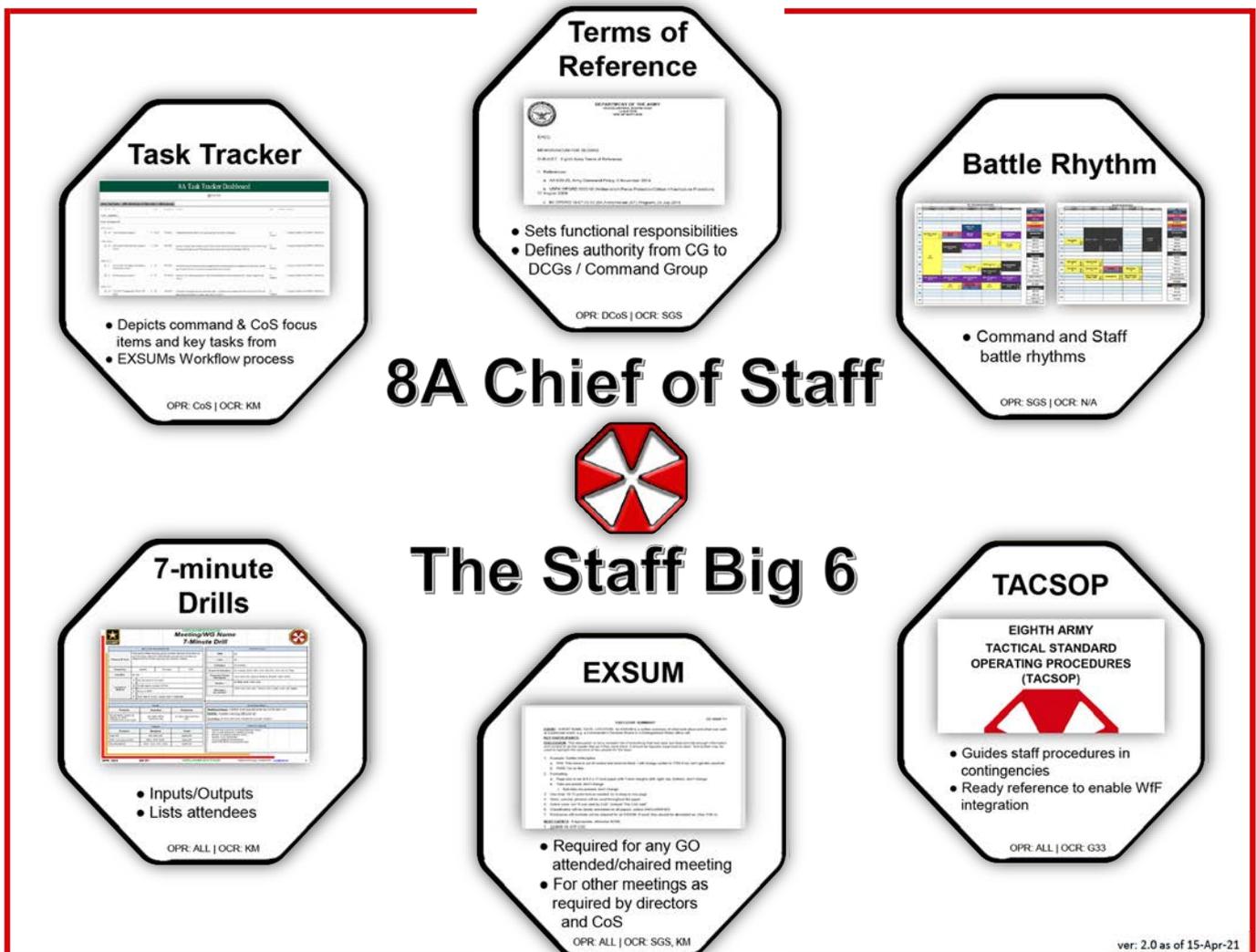


Figure 1. Eighth Army staff employ six common tools to help regulate headquarters actions and processes.

well-defined processes to help the commander and staff meet these responsibilities. This includes the military decision-making process, intelligence preparation of the battlefield, the targeting process, risk management and knowledge management.³

The staff must manage and synchronize each of these discrete processes in a manner that provides the commander with timely and relevant information to make decisions. These processes must further integrate into a system of command and control. This includes how the commander issues orders and guidance, and how subordinates provide feedback. The commander establishes “just enough” control to affect essential coordination to allow subordinates leeway in accomplishing the mission.⁴ The commander must also establish an “arrangement of people, processes, networks and command posts.”⁵

Again, the true challenge for the chief of staff is combining these multiple functions into a comprehensive system. The chief of staff must often “read between the lines,” defining specified and implied tasks and overall intent. The chief of staff must also understand that not only must he or she support the commander, but also must enable the operations of subordinate units. The chief of staff must also inform and integrate higher headquarters’ and adjacent organizations’ actions. In the end, the chief of staff must lead people and manage processes that bring multiple systems together into a cohesive whole.

Through much trial and error, I found a core of functions or tools that help bring these multiple strands of responsibilities into a manageable system. They are the chief of staff’s “Big 6.” These six tools aid the chief of staff in meeting the commander’s and staff’s needs. They are (1) terms of reference (ToRs); (2) standing operating procedures (SOPs); (3) battle rhythm; (4) seven-minute drills; (5) task list; and (6) executive summaries (EX-SUMs). All these tools help the chief of staff manage work flow, modulate the decision tempo, receive and give guidance, and allow commanders and staffs to plan, prepare and execute the commander’s vision. These tools

account for people, processes and organizations that must come together to achieve results.

It starts with people

The process of organizing a staff and employing the tools starts with people. Defining a person’s role and establishing a basis for action are the start points for effective administration.

A ToR document is a means to create a common understanding on the latitude for action afforded to each member of the team. Commanders cannot exercise command and control alone.⁶ The ToR is a means by which a commander delegates authority without absolving the ultimate responsibility for a decision or action.

Establishing clear roles and responsibilities is also one of a leader’s essential tasks in Army team building.⁷ Setting clear boundaries or zones of action in a clear, concise way empowers individuals within their sphere and creates efficiencies. A commander, through the chief of staff, creates a stable structure of delegation that, despite any changes or turbulence, builds continuity with this basic structure.

A good ToR spells out zones of action and responsibilities, defines relationships and, most importantly, delineates decision-making authority. The ToR, an act of delegation, clearly articulates the scope and degree of delegated powers. Particularly in a large headquarters, there is always too much work for the commander to do. Definitively assigning that responsibility from the outset saves time and organizational energy.

The ToR establishes “who” can act and in what sphere; the SOP specifies the “how.” A staff’s reaction to an SOP usually falls into one of two categories: they ignore it or give it scant attention. A staff will work frantically to create an SOP to pass the next inspection but then soon discard it when the short-term requirement passes away.

The much-maligned SOP is often an item to have and not use. Fundamentally the problem is one of construction and design. It’s not that SOPs are without value. When a staff creates an SOP in haste or with an ill-defined

scope and purpose, the resulting construction is also poor. They end up being massive tomes, fit more for propping open a door or window than being put into use. However, SOPs are not only essential, but when properly constructed, they are an effective tool for efficiency and continuity.

With this in mind, SOPs should focus on business rules and set procedural steps to guide the uninitiated and casual practitioners on how tasks get done. Effective SOPs use checklists and flow charts instead of dense text. SOPs work when they are simple, easy-to-read and written without technical jargon. A good SOP takes time to build, but it’s an investment in time at the front end that creates many efficiencies later.

Time management and decision flow are at the heart of the third tool: the battle rhythm. Arguably, the battle rhythm is the most important of all the chief of staff’s tools. The battle rhythm “provides structure for managing a headquarters’ most important internal resource: the commander’s and staff’s time.”⁸

A battle rhythm is a deliberate daily schedule to make the best use of available time. It helps synchronize headquarters activities horizontally and vertically. A good battle rhythm facilitates commander and staff interaction, helps create shared understanding inside and outside the headquarters, and sets a routine for coordination and interaction.⁹ The battle rhythm ultimately manages the organization’s workflow by setting expectations and tempo.

A chief must ensure the battle rhythm meets the commander’s decision-making style and that it is nested with higher headquarters’ information requirements when establishing the unit battle rhythm. It must not only allocate time for presentation and decision, but it must also ensure there’s time for the staff to do analysis and “real work.”¹⁰

The battle rhythm has to be flexible, but a chief of staff must tread carefully when contemplating *ad hoc* or spontaneous adjustments. Shifts in the rhythm may have larger, more damaging impacts on subordinate

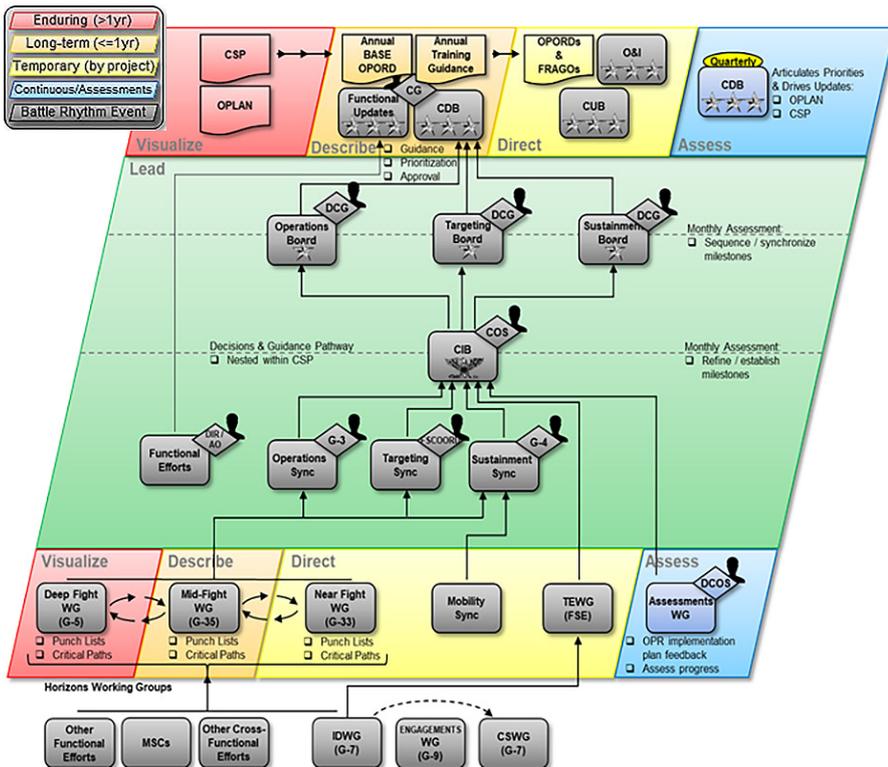


Figure 2. The battle rhythm supports a clear, critical path to decisions.

commands. Every event on the battle rhythm must have a clear purpose and a deliverable. It must have clear inputs and outputs. Thus, the battle rhythm's close companion and accompanying tool that assists in meeting the input and output criteria is the seven-minute drill.

The seven-minute drill is a concise "how-to" and content guide to aid staff officers in organizing, running and producing the desired results of a battle-rhythm meeting. A seven-minute drill exists for each item on the battle rhythm. Every battle rhythm must be connected in a decision-making pathway or chain.

Each seven-minute drill describes how a given meeting fits into the overall scheme. It must describe what comes before it and what its outputs must feed. It also must clearly state who must contribute, in what sequence and to what end. A good seven-minute drill designates a lead, provides an agenda, specifies what staff sections or leaders must be present and sets the frequency of meeting. Most importantly, the battle rhythm and seven-minute drill, working in concert, identify the critical path for staff members, leaders and subordinates to garner a decision from the appropriate

leader or commander.

The ToR and battle rhythm provide a pathway for decisions when taken together. Once a leader or commander makes a decision, it must be communicated. Staffs communicate most decisions via an order, but many decisions made in the planning process do not lend themselves well to publication in an order. To capture these outcomes, staffs must publish results in a routine way. Publishing an EXSUM is a simple and effective means of dissemination.

Reporting the outcome of a meeting through an EXSUM is a key enabler in the staff process. Along the decision pathway, the commander, his subordinate leaders and staff interact in multiple ways. The most common interaction is when the commander or subordinate leader gives or receives guidance. The recommended plan or course of action changes or undergoes revision in this dialogue.

Preferably, every activity on the battle rhythm is captured by an attentive staff member and published to the entire staff and subordinate commands via an EXSUM. This summary captures the key points of the engagement, decisions made, requests for information

and due-outs. These summaries are then fed into the headquarters' knowledge-management system, where the staff views and processes them. The EXSUM provides a record of action and decision, a base of knowledge to enable follow-on action.

In the daily course of operations, not all guidance or directives fit neatly into the command's decision pathway. Therefore, a commander and staff frequently identify problems, initiatives or opportunities that require more study or analysis before the commander decides to take more definitive action. The commander will issue guidance and tasks in any venue.

A staff must be able to record these tasks, assign responsibility, establish a suspense and provide feedback to the commander. A consolidated command task list is a means to capture and follow through on these directives. The chief of staff is uniquely suited to help define the task and identify which staff section has the required expertise. The chief should also determine what other staff entities may have a supporting role, assign a suspense, prioritize effort and establish the amount of effort to apply to the given task. Assigning a staff lead is also not always as easy as it seems.

FM 6-0 establishes clear responsibilities, but some staff-action items may not fit neatly into a coordinating or special-staff director's purview. Assigning the right action entity is not always readily apparent. This discretion is clearly an art; appropriately assigning appropriate roles and responsibilities can save time and effort.¹¹ The decision depends on capability, capacity, expertise or experience.

The final bit of additional discretion applied by the chief of staff requires him or her to determine the level of effort or degree of completion necessary for the given task. Not every product can be perfect, or even needs to be perfect, particularly in a time-constrained environment. The chief of staff must make a deliberate call to determine the level of development a staff product must meet and who will conduct the first review of this product to provide guidance for its further refinement. A common task list,

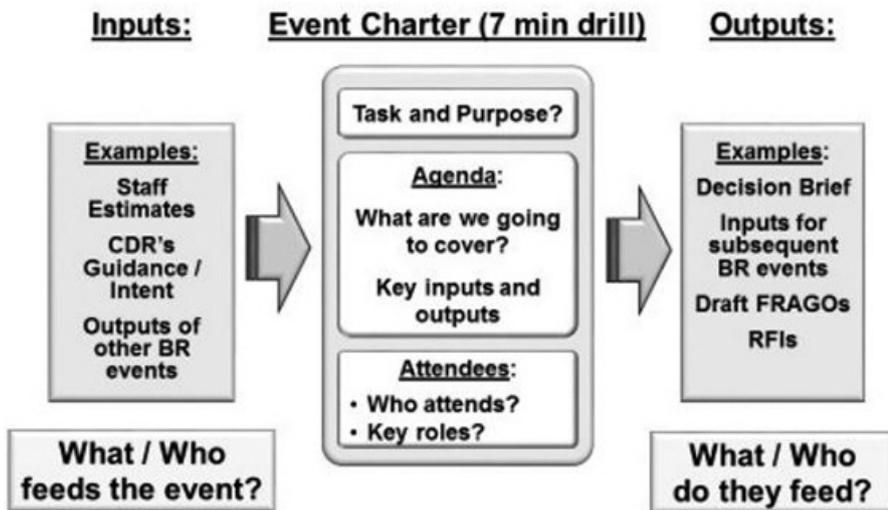


Figure 3. Essential information of a seven-minute drill. (Source: Department of Defense, *Knowledge and Information Management*, 3rd Edition, May 2018, https://www.jcs.mil/Portals/36/Documents/Doctrine/fp/knowledge_and_info_fp.pdf?ver=2018-05-17-102808-507)

routinely reviewed, helps ensure that the staff captures and answers commander's directives and questions.

Takeaway

The chief of staff's "Big 6" are not the "be all and end all" of properly administering a staff. These are but observations and accumulated lessons I've learned over time. My hope is that these observations add to the discussion and provide others the thoughts and possible means to expand on and improve the performance of their own organizations.

These tools are not meant to restrict human creativity. As a recent article on staffs warned, competent staff officers "must be able to drive the staff process instead of becoming victim to them."¹² Therefore, the "Big 6" creates a structure for interaction, and it's a means to regulate the function of complex and complicated organizations. The ultimate aim is that this is "a process and chain of events that starts with an idea and ends with an advantage."¹³

Staff officers must always strive to promote the staff virtues of competence, clarity of thought, initiative, adaptability and flexibility.¹⁴ These qualities, coupled with efficient processes, will enable an organization to achieve results. My wish is that they may help to empower your organization.

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Command, Fort Bliss, TX; and commander, 4th Battalion, 6th Infantry Regiment, Fort Bliss. COL Morgado's military schools include the Armor Officer Basic Course; Aviation Captain's Career Course; Command and General Staff College; Advanced Military Studies Program, School of Advanced Military Studies (SAMS); and Advanced Strategic Leadership Studies Program, SAMS. COL Morgado holds a bachelor's of arts degree in government from Lehigh University and a master's degree in diplomacy from Norwich University.

Notes

- ¹ FM 6-0, *Commander and Staff Organization and Operations*, Washington, DC: Headquarters Department of the Army, May 2014.
- ² Army Doctrine Publication (ADP) 5-0, *The Operations Process*, Washington, DC: Headquarters Department of the Army, 2019.
- ³ Ibid.
- ⁴ ADP 6-0, *Mission Command: Command and Control of Army Forces*, Washington, DC: Headquarters Department of the Army, July 31, 2019.
- ⁵ Ibid.
- ⁶ Ibid.
- ⁷ Army Training Publication (ATP) 6-22.6,



Figure 4. Soldiers assigned to the Eighth Army staff conduct a sync meeting at the unit's headquarters on U.S. Army Garrison – Humphreys, Republic of Korea Aug. 11, 2021. (U.S. Army photo by SGM Andrew Kosterman, Eighth Army Public Affairs Office)

Army Team Building, Washington, DC: Headquarters Department of the Army, October 2015.

⁸ ATP 6-0.5, **Command Post Organization and Operations**, Washington DC: Headquarters Department of the Army, March 2017.

⁹ FM 6-0.

¹⁰ Ibid.

¹¹ ATP 6-22.6.

¹² Eric Aslahson and Richard T. Brown, "Staff Colonels are the Army's Innovative Engines," **Army**, December 2016.

¹³ Ibid.

¹⁴ ADP 6-0.

ACRONYM QUICK-SCAN

AO – action officer

BR – battle rhythm

CDB – command decision board

CIB – chief of staff's integration board

CG – commanding general

CoS – chief of staff

CSP – campaign-support plan

CSWG – communications-strategy working group

CUB – commander's update brief

DCG – deputy commanding general

DCoS – deputy chief of staff

Dir -- director

EXSUM – executive summary

FM – field manual

FRAGO – fragmentary order

FSCoord – fire-support coordinator

GO – general officer

IDWG – information-dominance working group

MSC – major subordinate command

O&I – operations and intelligence

OPLAN – operational plan

OPORD – operations order

RFI – request for information

SOP – standing operating procedure

TEWG – targeting and effects working group

ToR – term of reference

WfF – warfighting function

WG – working group

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Derived from Center of Military History information provided at <https://history.army.mil/html/moh/civwaral.html>. Listed alphabetically. Note: Asterisk in the citation indicates the award was given posthumously.

LUCAS, GEORGE W. PVT
Unit: Company C, 3rd Missouri Cavalry. Place and date of action: Benton, AR, July 25, 1864. Entered service: Mt. Sterling, Brown County, IL. Born: Adams County, IL. Date of issue: December 1864. Citation: Pursued and killed Confederate BG George M. Holt, Arkansas Militia, capturing his arms and horse.

LYMAN, JOEL H.
Rank and unit: Quartermaster sergeant, Company B, 9th New York Cavalry. Place and date of action: Winchester, VA, Sept. 19, 1864. Entered service: East Randolph, NY. Born: Cattaraugus, NY. Date of issue: Aug. 20, 1894. Citation: In an attempt to capture a Confederate flag, he captured one of the enemy's officers and brought him within the lines.

LYON, FREDERICK A. CPL
Unit: Company A, 1st Vermont Cavalry. Place and date of action: Cedar Creek, VA, Oct. 19, 1864. Entered service: Burlington, VT. Born: June 25, 1843, Williamsburg, MA. Date of issue: Nov. 26, 1864. Citation: With one companion, captured the flag of a Confederate regiment, three officers and an ambulance with its mules and driver.

MADISON, JAMES SGT
Unit: Company E, 8th New York Cavalry. Place and date of action: Waynesboro, VA, March 2, 1865. Entered service: Fairport, NY. Born: Niagara, NY. Date of issue: March 26, 1865. Citation: Recapture of GEN Crook's headquarters flag.

MANDY, HARRY J. 1SG
Unit: Company B, 4th New York Cavalry. Place and date of action: Front Royal, VA, Aug. 15, 1864. Entered service: New York, NY. Born: England. Date of issue: Aug. 26, 1864. Citation: Capture of flag of 3rd Virginia Infantry (CSA).