

Insights and Best Practices

Focus Paper



Joint Headquarters Organization, Staff Integration, and Battle Rhythm

Third Edition

**Deployable Training Division
Joint Staff J7**

September 2019

Approved for public release

This is the Third Edition of the Insights and Best Practices Focus Paper on “*Joint Headquarters Organization, Staff Integration, and Battle Rhythm.*” It is written by the Deployable Training Division (DTD) of the Joint Staff J7 and released by the J7 Deputy Director for Joint Training.

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Scope:

- Addresses both CCMD and JTF HQs.
- Continues to recommend the traditional J-code staff organization.
- Addresses key billets within the organization, Terms of Reference, and inclusion of external mission partners.
- Describes staff integration to support commander decision making.
- Emphasizes effective battle rhythm management.
- Reinforces the relevance and value of knowledge management.

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Terminology and Acronyms: Numerous military acronyms and organizational names are used in this paper. They are defined in the glossary to improve readability in the body of the paper for the intended readership.

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PREFACE

This paper discusses insights and best practices related to organizing a joint headquarters, integrating the staff, and developing effective battle rhythm and knowledge management processes to enhance timely and effective commander decision-making. We derive our insights and best practices from observing actual joint headquarters.

This paper may be beneficial to three main audiences:

- Commanders, Chiefs of Staff, and Joint Directors, as they develop and refine HQs organization, staff integration, and battle rhythm—to better inform decision-making and support their subordinate formations.
- Staffs, as they seek to improve decision-quality information, enrich commander’s decision making, and share awareness up, down, and across to other organizations.
- The Joint Staff in their role of assisting the Chairman in the role of the Global Integrator.

Four considerations:

- Remain commander-centric. Organize and develop processes to support the commander and subordinates – do not overly focus on staff-centric processes. Retain agility and speed.
- Continually to review (assess) both the organization and processes in terms of how effectively they support the commander’s decision-making requirements to operate at the speed of the many challenges faced by the Command.
- Understand the role of HQ within the larger strategic framework and reality of globally integrated operations. This may affect, make critical, relationships with your partners.
- Remain inclusive with external partners and stakeholders.

This and other focus papers share observations and insights on joint force HQs identified by the Joint Staff J7 Deployable Training Division. The DTD gains insights on operational matters through regular contact and dialogue with CCMD- and operational-level commanders and staffs as they plan, prepare for, and conduct operations and exercises. The DTD incorporates these insights in function focus papers, refines the focus papers through senior officer feedback, and shares them with the operational force, and joint lessons learned and joint doctrine communities. Four related focus papers to this paper are *Knowledge and Information Management*, *Chief of Staff Roles*, and *HQ Terms of Reference*, and *Forming a JTF Headquarters*. These papers are found on the site noted on the inside front cover.

Please send your thoughts and best practices to DTD’s POC, Mr. Mike Findlay. URL and email contact information is on the inside front cover.



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1.0 EXECUTIVE SUMMARY. Without exception, we find that commander-centric organizations outperform staff-centric organizations. HQ organization, staff integration processes, and the supporting battle rhythm directly affect agility and quality of support to the Commander, awareness of partners, and direction to subordinates. Development and discipline of a HQ’s organization, its processes, and battle rhythm are Commander, Chief of Staff (COS), and J-Director responsibilities.

The strategic landscape has become more complex – it is characterized as transregional, all-domain, and multi-functional. Growth in information technology and increased expectations and demands for real-time information have also affected Joint Headquarters. These factors influence the HQ organizations and decision support processes as joint commanders apply both art and science to understand the situation, frame problems, plan, and execute at the speed of relevance.

Many commands have modified their HQ organization and processes to accommodate these changes. In many cases the staff structures and processes have become more complex to perform the necessary cross-functional analysis and coordination to support commander decision-making requirements. However, we find a heightened awareness on the need to stay focused on agile and relevant support to the commander, and not allow the temptation for HQ growth or increased complexity in processes impede that support.

Key Insights:

Organizing. Not all joint HQs are the same. Mission requirements determine specific capabilities and functions, which in turn dictate organization, processes, and manning. Early commander guidance on the role of the HQs and required functions, together with an emphasis on inclusion of external mission partners (including coalition, partner nation, and interagency representation) will focus organizational design, inform processes, and better enable unity of effort with partners.

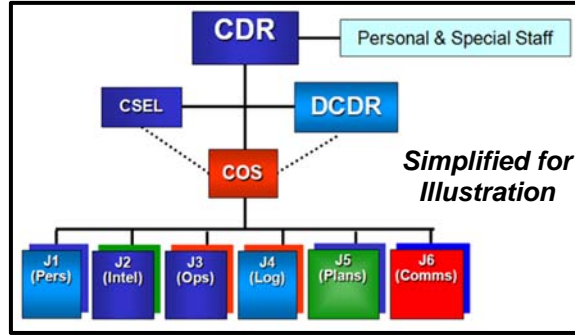
Staff Integration. Decision support is enhanced when functional expertise from across the staff and from external mission partners is brought together in direct support of the commander’s decision requirements. Well-conceived and deliberate interaction between J-codes, working groups, operational planning teams, and decision boards leverage the analytical capability of the entire staff and mission partners to support decision requirements. The use of cross-functional staff integration elements (frequently referred to as Boards, Bureaus, Centers, Cells, and Working Groups [B2C2WGs] and OPTs), coupled with solid Knowledge Management (KM) processes, makes staff coordination more routine; facilitates monitoring, assessment and planning; and enhances management of activities across the three event horizons (current operations, future operations, and future plans).

Battle Rhythm. The battle rhythm provides the structure for managing the HQ’s most important internal resource - time - and directly supports commander decision making and the operations of subordinates and mission partners. The HQ’s battle rhythm must not only support decisions across the three event horizons, but also account for the battle rhythms of higher and adjacent mission partners, all while enabling timely direction and guidance to subordinate units.

“I want you to see us as your best higher headquarters ever.” (statement by a CCDR to a subordinate JTF speaking to the role of the higher HQs in supporting their subordinates)

2.0 HEADQUARTERS ORGANIZATION.

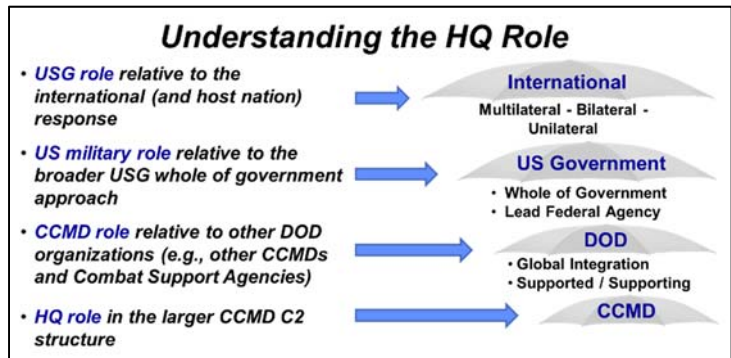
We continue to find that the traditional HQ structure with a Commander, Deputy(s), Command Senior Enlisted Leader (CSEL), Chief of Staff, personal and special staffs, and J-staff is most effective. This basic structure provides the headquarters with effective and efficient coordination and control, accountability, and administration characteristics less evident in other types of organizations. This structure ensures the major directorate principals remain accountable through the CoS to the Commander for the major functions of the HQ. It also facilitates the rapid integration of staff augments, is recognizable and understood across the Joint Force, Services, and our partners, and allows for effective interaction with other HQs.



We have found several functions within HQs that require clarification on which staff and senior leaders is responsible. They include assessment, fires and targeting (kinetic and non-kinetic), interagency and multinational coordination, key leader engagements, reports to higher HQ, and knowledge and information management. While an SOP may codify these functions, we find that their inclusion in a TOR (discussed below) provides better awareness of Commander’s expectations.

As noted earlier, size of HQs is also important; large HQs often take on unnecessary functions, require more internal coordination, and have the potential to overwhelm mission partners with demands for information, all of which can reduce the focus on providing agile support to commander decision requirements and subordinates.

Mission drives function. The role of the HQs will largely dictate required functions, processes, liaison, and outputs. As depicted in the adjacent figure, the HQs role is a function of the USG role relative to other actors, the US military role relative to other USG agency actors, the CCMD role relative to other DOD organizations, and internally to a CCMD, the HQs role with the other components. Spend time upfront understanding the role of the HQs, and identifying required HQ functions, and determining and codifying the appropriate organization, responsibilities, and processes before focusing on specifics of manning.



Terms of Reference (TOR). Most commands describe or direct organization, staff roles and responsibilities in SOPs or HQ instructions. However, we find that many develop a Commander-unique TOR document to delineate roles, authorities, and responsibilities for the command group and key staff (the figure denotes four of several more roles). TORs help clarify key leader portfolios and informs

CJTF Senior Leader TOR - Sample Template -				
Leadership Position	CJTF Commander	Deputy CJTF Commander	CSEL	COS
HQ Locn, Key Functions and Oversight	•	•	•	•
Engagement Responsibilities - Up and Out	•	•	•	•
Authorities	•	•	•	•
Oversight of Supporting & Subordinate Orgs	•	•	•	•

the staff and partners how to better interact with the HQ. The Commander drives the TOR based on personal experience, while the COS has responsibility for its production and dissemination. (See *JTF C2 and Organization*, *Chief of Staff Roles*, and *TOR Insights* for more detailed discussion on TORs.)

Key Billets. One of the HQ senior leaders' primary responsibilities is identifying and filling key billets with the right people, e.g., Deputy Commander, COS, CSEL, principal staff officers, some of the special staff, and key multinational embedded staff officers. Some of these critical positions (e.g., Political Advisors and Cultural Advisors) often can provide invaluable insights for the commander and the staff. By-name requests from the commander are common for filling many of these key billets. The COS is responsible to receive and integrate these personnel properly into the HQ to build trust and relationships among the rest of the staff.

External Mission Partners. Think "inclusion" from the outset. Establishing a process to include external mission partners in cross-functional venues is a key element of effectively integrating a staff and providing the best support to commander's decision making. We continue to see the benefits of reaching out early to interorganizational and multinational partners and the various supporting DOD agencies through commander involvement and exchange of liaison elements. An inclusive command climate, logical organizational design, and solid internal staff procedures are all necessary to support decision making within a unified action environment. Joint HQ personnel will usually be working with interagency and multinational mission partners. This has HQ implications for training, staff organization, and information sharing authorities. When working with interagency and multinational mission partners (e.g., NATO), we find that HQs need to maintain a current and accurate NATO (crisis establishment) or other billet description to ensure personnel meet the experience and qualifications demanded by the position. Leveraging existing relationships can speed inclusion with mission partners and stakeholders. It is also important to account for national caveats when considering the integration of multinational partners.

Individual Augments. We frequently see joint staffs struggling with the challenges of integrating individual augments and reservists, especially in HQs that have a high turnover rate. All HQs staffs deal with the challenges of integrating members from different Services. However, we have observed the most effective use of augmentees occurs when the gaining command maintains a habitual relationship with dedicated Reserve units. We see the benefits to staff integration and effectiveness when all members are trained on the HQ role and mission, specific processes and procedures, understand their responsibilities, and work together in support of the commander's objectives. We find that time spent upfront in developing new staff member pre-deployment training plans, command and directorate SOPs, and a strong reception program including left seat / right seat rides, improves staff integration by assisting incoming personnel in getting quickly up to speed. Unfortunately, the most egregious mistake we have witnessed involves commands planning for augment support in a "fight tonight" scenario when realistically, they will not be available for roughly 90 days. This implies the need for commands to review their crisis personnel requirements and identify immediate sourcing solutions or temporary bridging capabilities.

Liaison Officers. Exchanging LNO teams is the most commonly employed technique for establishing close, continuous, physical communications among organizations. Establish liaisons between higher and

The world ought to be full of LNOs, but much empowered LNOs....an LNO must be able to speak for the command, your command, and the parent command, plus he must be able to accurately reflect what he's getting from the other end with a maturity that makes a difference. He must be welcomed into their inner circles, effectively. We had huge success with that because our LNOs really made an effort to do that, and they were credible and their integrity was so good that they had access to the most senior people all the time.

- Former SOF Commander

subordinate commands, between adjacent units, and between supporting, attached, and assigned forces. Exchange LNO teams with multinational partner forces, the host nation (possibly via a specific Embassy or Embassies), and interorganizational entities. Request LNO teams from your partners as well. HQ LNOs should be of sufficient rank to influence the decision-making process and should possess the requisite skill sets (technical training or language skills) to liaise and communicate effectively. Often, LNOs can bridge the culture gap between what multinational commanders and staffs say, and what they mean. (See *KM paper for LNO guidance*)

Enablers. Commands frequently struggle in their understanding of strategic and operational “plugs” that can support them. Understanding the multitude of available joint and multinational enablers, and how to request and leverage their capabilities, are crucial for mission success. However, planning for their involvement requires an effective joint reception, staging, onward movement, and integration process to optimize enabler capabilities. We have seen that the combatant commander has more leverage getting DOD assets, but all joint and multinational staffs need to anticipate requirements. Enablers can come from within DOD such as USTRANSCOM’s JECC and JTF-PO. Other DOD enablers can include DLA’s JCASO planners or USPACOM’s Deployable Joint Task Force Augmentation Cell. Enablers from outside DOD can include representatives from other U.S. government agencies such as USAID and FEMA or may come from multinational partner nations. Incorporating and leveraging multinational partner nation’s enablers can be challenging but also equally rewarding. Gain understanding of interagency and multinational partner’s authorities. These mission partners may come with restrictive authorities that limit their capabilities or with additional authorities that your command may not have. Leverage their authorities to accomplish the mission.

Insights and Best Practices:

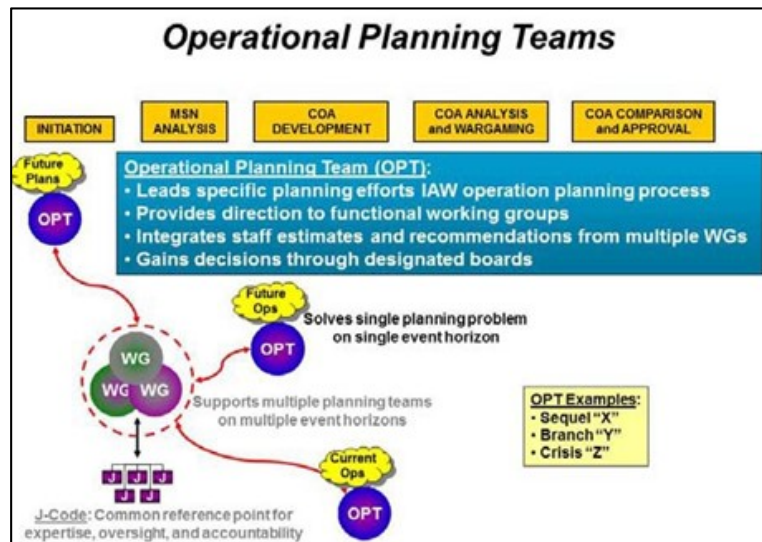
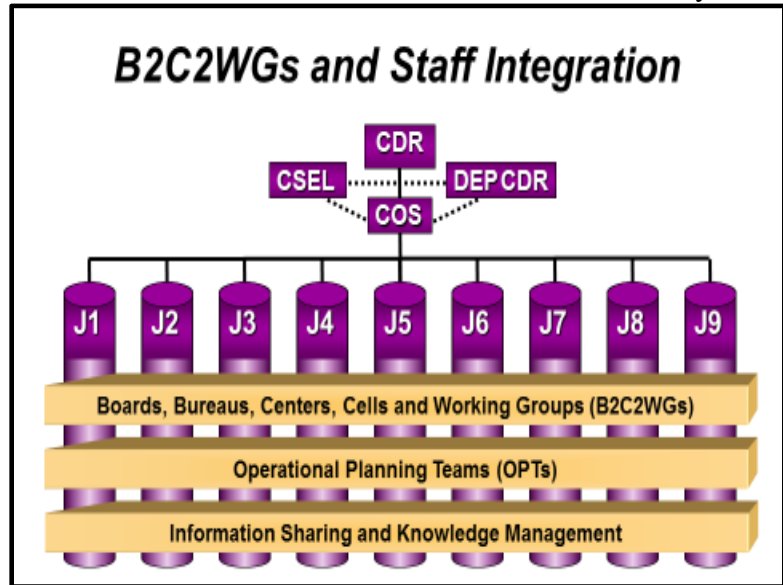
- Spend time upfront understanding the role of the HQs, and identifying required HQ functions, and determining and codifying the appropriate organization, responsibilities, and processes before focusing on specifics of manning.
- Maintain a “bias for action” by developing a lean HQ organization, requesting necessary staff expertise, leveraging an effective liaison network, and developing efficient staff processes.
- Leverage mission partner capabilities and authorities across interorganizational entities to enable mission success. Incorporate USTRANSCOM, other DOD, interagency, and multinational enablers. Your multinational partners can communicate with, and influence their national governments more quickly and effectively than you can through formal channels.
- Commanders and staffs must spend significant time and effort in building and maintaining trust, continuous dialogue, and developing a shared understanding with the many mission partners to ensure synergy and unity of effort.
- Gain unity of effort with mission partners and other stakeholders by identifying a common set of desired outcomes. This is inherently commander led. Understand interagency and multinational partner authorities and caveats.
- Consider that the individual augment sourcing process typically provides sourcing within 90-120 days of completion of the SecDef Orders Book (SDOB).
- Develop training plans and continuity/turnover procedures designed to integrate incoming personnel quickly into the staff.
- Anticipate requirements for long-term force sustainment.

3.0 STAFF INTEGRATION. Staff integration and battle rhythm enhance staff support to commander decision-making. This section addresses the role of OPTs, WGs, decision boards (including a plans management board), and centers as staff integrating venues. This section serves as a precursor for subsequent sections on battle rhythm development and knowledge management.

B2C2WGs. There are clear benefits of the J-code structure in terms of effectiveness, efficiency, administration, accountability, and “plug and play” functionality. However, there is a common tendency for knowledge and expertise to be “stovepiped” within the J-code directorates due to the sheer number of ongoing staff actions. B2C2WGs can mitigate this risk. B2C2WGs and OPTs bring together cross-functional expertise of the staff to support the commander and subordinates.

Cross-functional B2C2WGs overlaid on a vertical J-code structure provide a powerful means of staff integration used successfully in many joint HQs. For many new staff members, the concept of B2C2WGs and their interaction in support of commander decision making can be confusing. We find that the COS must continually reinforce the value and necessity of this horizontal, cross-functional approach to include mandatory participation and support by J-code directorates. B2C2WGs attendees should be empowered to speak on behalf of the staff they are representing and have the mandate to share information with their parent directorate. Directors and staff leaders must manage scheduling to prevent meeting “fratricide.” A discussion on 7-minute drills used for managing B2C2WGs follows in the battle rhythm section of this paper.

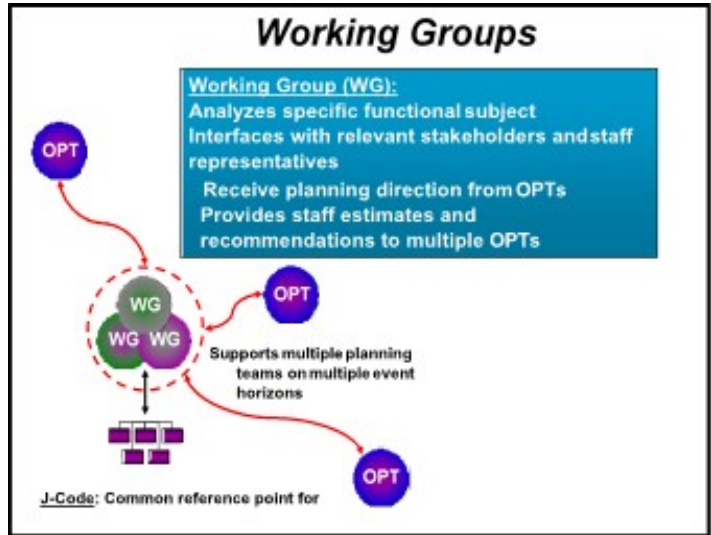
Operational Planning Teams (OPTs). OPTs form the foundational planning leadership that provides direction to working groups (WG). OPTs are established to solve a single problem related to a specific task or requirement on a single event horizon. In most cases, OPTs are not enduring; they dissolve upon completion of the assigned task. OPT membership is typically determined by the staff officer responsible for the event horizon in which the OPT is working; i.e., the J5 for future plans, J35 for future operations, and J33 for current operations. The chart above depicts the interaction between OPTs, WGs, and J-code directorates. The two-way arrows represent the flow of information as OPTs request and receive support from the multiple WGs. As the OPT works its way through the Joint Planning Process (JPP), it provides planning direction based on commander guidance to multiple WGs and receives cross-functional expertise in



the form of analysis and staff estimates in return.

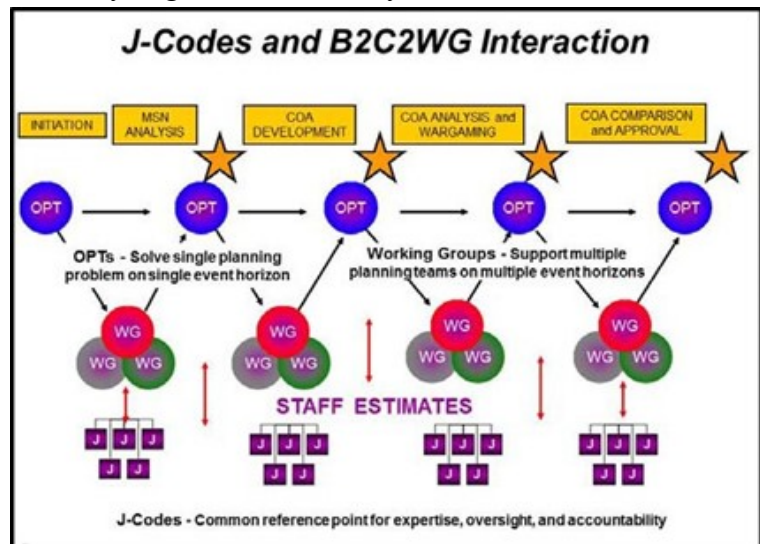
Working Groups. WGs play an important role in supporting decision making. A WG is a more permanent cross-functional organization formed to develop, maintain, and leverage expertise from within and external to the HQ in order to provide analysis and recommendations on more enduring challenges across all three event horizons. WGs are manned by the J-codes and other sources of expertise pertaining to the WG’s function. Information flows in both directions between WGs and the J-code directorates.

WG members both inform and are informed by their parent directorates. For example, the J4 representative to a WG is expected to provide subject matter expertise and recommendations regarding the logistics supportability of various courses of action while also keeping the J4 Director and staff informed of WG actions and receiving Director’s guidance. We observe the importance of consistency of subject matter expertise and directorate-level staff estimates throughout various WGs in the functioning of the HQ staff. It is often not possible for the same subject matter expert to attend all WGs, thus complete staff estimates are essential.



Joint HQs may have a comprehensive menu of B2C2WGs to choose from, depending on the operation or phase of operation. A joint HQ may have a menu of 100+ B2C2WGs along with COS-approved 7-minute drills, but only use 30-40 of them at any one time. For example, a Deployment WG or a JRSOI WG may be active only during deployment planning through JRSOI. Afterwards, the two WGs would be inactivated. Other WGs may remain active for extended periods, i.e., targeting WG, Assessment WG, ROE WG, and Intelligence Collection WG. In some cases, participating in another HQ’s B2C2WG venue may negate the need for your HQ to activate the same venue, e.g., one command may be responsible for all retrograde activities, thus your HQ may have no need for a retrograde WG--this saves resources in your HQ.

Decision Boards. The chart on the right depicts an OPT as it works its way through the JPP. The OPT briefs the commander to gain guidance or decisions at specified intervals, normally at a board. A board is a designated group of individuals within a HQ appointed by the commander (or other authority) that meets with the purpose of providing guidance or decision.



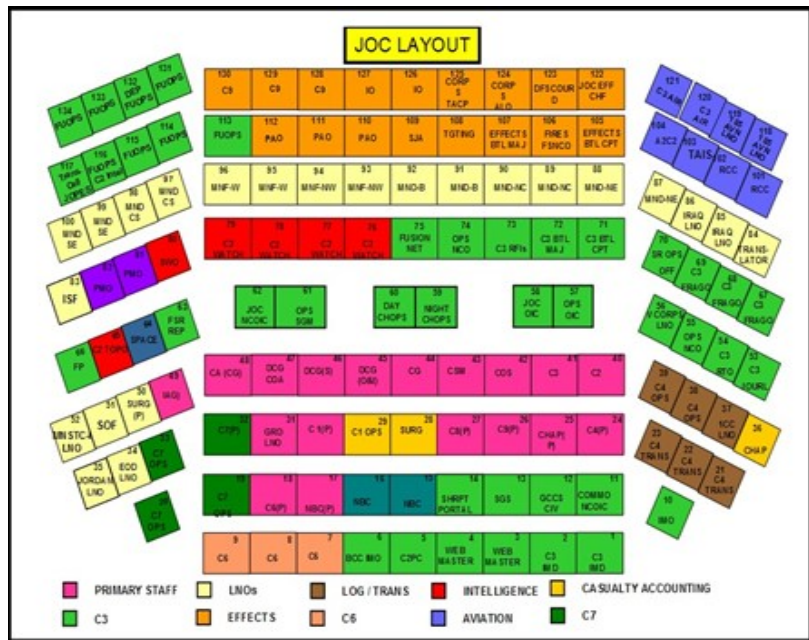
Command boards are chaired by the commander; functional boards are chaired by another senior leader to whom the authority to decide a particular matter has been delegated. We often see

functional boards used to synchronize assets, prioritize planning, or allocate resources.

A best practice associated with decision boards is bringing multiple requirements for decisions to a single, regularly scheduled board. This type of logical and coordinated scheduling uses senior leaders' time in an efficient manner and increase the amount of “white space” in the battle rhythm (discussed in Section 4.0 below). The interaction between boards, centers, WGs, J-codes, and OPTs is the key to the efficient and effective functioning of the staff in supporting commander decision making. The figure above depicts this interaction. Along the top of the figure are the first steps of the JPP. Starting on the upper left-hand side, an OPT is formed to address a particular problem on a single event horizon. As the OPT progresses through the planning process, it interacts with the WGs that can provide expertise related to the specific planning problem and reaches designated decisions depicted by the gold stars. Each WG typically supports multiple OPTs at the same time.

J-code staff principals are actively involved in this process to insert their experience and expertise. They provide manpower and expertise to both the WGs and OPTs and receive feedback from each, but directorate responsibilities do not end there. Each staff director also ensures a common staff estimate is shared with the OPTs and WGs, and fully vets COAs prior to them being brought to the commander. We observe that staffs that struggle with producing quality decision-making material to the commander often have a breakdown in the interaction between and among the J-Directors, WGs, and OPTs. This interaction is the critical foundation to development of feasible COAs.

Centers. Centers are permanent, cross-functional staff integrating organizations. The Joint Operations Center (JOC) is the most familiar center typically found in a joint HQ. Other key centers include the Joint Logistics Operations Center (JLOC), the Joint Intelligence Operations Center (JIOC) and in some cases, the Civil-Military Operations Center. We observe that every HQ uses some form of a JOC with dedicated manning and facilities to integrate the staff within the current operations event horizon. The JOC focuses on supporting the direct, monitor, assess, and plan functions for the commander - most often out to a 72-96 hour time horizon.

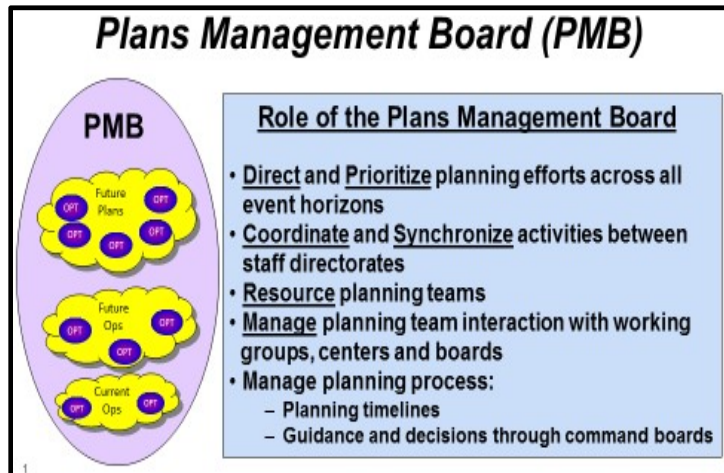


The JOC requires significant support from the entire staff and LNO teams from subordinate and supporting units and other mission partners. It is necessary to have representation from all critical functions affecting the mission. Placement of the various functions on the JOC floor is a deliberate process that facilitates cross-functional coordination and synergy. For example, collocating functions like public affairs and information operations in the JOC provides added value and speed of coordination. The above chart depicts an example of a layout for a mature JOC supporting an enduring mission.

Management and Synchronization of Activities (Plans Management is discussed in greater detail in the *Design and Planning* focus paper). With limited manpower and SMEs, a HQ cannot support an unlimited number of B2C2WGs. We typically observe a higher demand than supply for trained and experienced planners. We also see that low-density staff sections (e.g., legal or interagency) often cannot support unlimited planning efforts. Prioritization and resourcing of planning efforts are important to retain staff focus on those actions important to the commander.

We have observed a variety of different methods of prioritizing and resourcing planning efforts. We find that the COS must be postured to prioritize staff and planning efforts IAW the commander's priorities. A Plans Management Board (PMB) or similar venue, with the appropriate decision authority, is a best practice and ensures that the highest

priority problems receive the most planning attention and resources. As depicted in the figure above, the PMB directs, prioritizes, coordinates, and synchronizes activities between and among staff directorates. This allows for more efficient use of time and resources.



In addition to a PMB that may meet on a weekly basis, we have observed other examples of staff synchronization that complement the management and prioritization process by meeting on a more frequent basis. A Synchronization Board, held at the Operations or Plans directorate level, is a useful tool for ensuring missions and tasks are coordinated across different event horizons. We have also observed the utility of a periodic synchronization event termed the "Council of Colonels" that helps to synchronize the efforts of the staff (but not as a substitute for a PMB). This type of event ensures directorate-level cross-functional synchronization by reviewing the events of the past 24 hours and prioritizing tasks for the next day or week.

Another effective tool for harmonizing the HQ staff and subordinate components is use of a Joint Operations Directive or "night orders" which summarizes current operations in space and time, provides commander's intent and guidance, identifies the way ahead, as well as establishes tasks resulting from decision boards. These messages, typically drafted as orders, allow staffs to quickly gain and share situational awareness and understanding.

Insights and Best Practices:

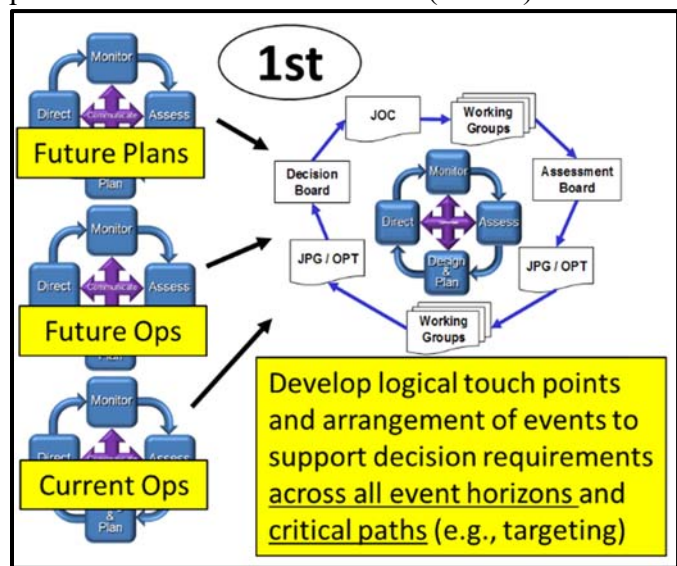
- Use B2C2WGs and OPTs, underpinned by disciplined Knowledge Management processes, to integrate the staff across J-code directorates.
- Represent cross-functional representation from critical mission areas in centers.
- Ensure WG members both inform their parent directorates and are informed by them. The consistency of subject matter expertise and directorate-level staff estimates informing B2C2WGs are critical to effective staff work.
- Use decision boards as opportunities to combine multiple requirements for guidance or decisions by the commander into one venue.
- Use a Plans Management Board or similar venue to coordinate, synchronize, and prioritize planning and staff resources across the three event horizons (i.e., current operations, future operations, and future plans).

4.0 BATTLE RHYTHM. The creation, use, and discipline of an effective HQ battle rhythm directly supports commander decision-making and subordinates' success. Inputs and outputs of the various battle rhythm events should logically support each other and the commander's decision requirements.

A battle rhythm is a routine cycle of command and staff activities intended to synchronize current and future operations. - Joint Pub 3-33

Commander-centric Approach. The first step in developing a battle rhythm is logically arranging B2C2WGs around the commander's decision requirements with decision venues (boards) as

culminating events. We refer to the actual interaction points between the commander and staff as "touch points." One example of a touchpoint is the daily update brief to the commander. As depicted in the adjacent figure, all three event horizons leverage the touch points with the commander to gain guidance and direction and seek decisions while preserving the commander's time. We have observed many HQs successfully use a "critical path" construct to map inputs to and outputs from the B2C2WGs to focus this effort. The critical path should carry an idea, issue, or information from its inception in an OPT or WG all the way to a decision board and back.



The commander's decision-making style will affect interaction with the staff. Every commander has unique personal decision-making and staff interaction preferences, influenced by the mission and the demands of HHQ. The level of involvement between the commander and staff can vary significantly based on preferences as well as the requirements of HHQ. We observe many staffs spend significant effort and manpower attempting to support the commander in ways that the commander may not want - or in ways that did not meet the demands of the mission or HHQ. Consequently, the staff becomes frustrated. Understanding the commander's style and developing routine touch points reduce the frustration.

Touch points with the commander directly informs and enriches planning, and result in guidance, decisions, and intent. During the early phases of design and mission analysis, the commander can provide useful guidance and direction to the staff. Gaining commander guidance focuses and aligns the staff with the commander's guidance and intent.

Decision Making Styles of Commanders

The staff exists to support the Commander's decision making requirements and the subordinate units

<p>Interaction Styles</p> <ul style="list-style-type: none"> • Some use small groups, others large groups to receive, deliberate on, and make decisions (<i>information sharing and battle rhythm implications</i>) • Different preferred means for interaction with staff and with subordinates, e.g., one on one, through COS, VTC or in person (<i>battle rhythm implications</i>) 	<p>Personnel Utilization Styles</p> <ul style="list-style-type: none"> • Different views on use of Deputies, COS, J-Dirs, and Special Staff (<i>Terms of Reference implications</i>) • Different use / role of liaison elements (<i>information sharing and staff implications</i>) • Different empowerment approaches inside HQ and with subordinates (<i>Codified decision approval matrices battle rhythm implications</i>)
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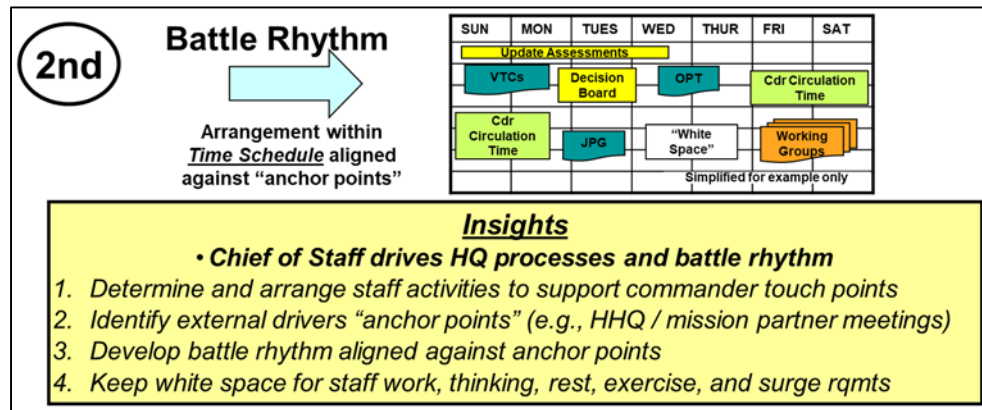
Information Sharing / Visualization Styles

- Dialogue techniques with HHQ – to inform and be informed (*Staff support requirements, BR anchor points, Sharing venue implications*)
- Different information requirements and preferred ways to receive information (*CCIR, reporting, and briefing implications – use of graphics / words implications*)

Understand the decision making style of the Commander

Logical Arrangement of Battle Rhythm Events. The second step in development of a battle rhythm lays out these B2C2WG events on a calendar. There may be certain “anchor points” with higher HQs or key partners such as important VTCs or decision briefs that affect timing of battle rhythm events.

A battle rhythm needs flexibility, adaptability, and the ability to handle dynamic changes in mission requirements and higher headquarters (HHQ) and subordinate demands. At the same time, the battle rhythm

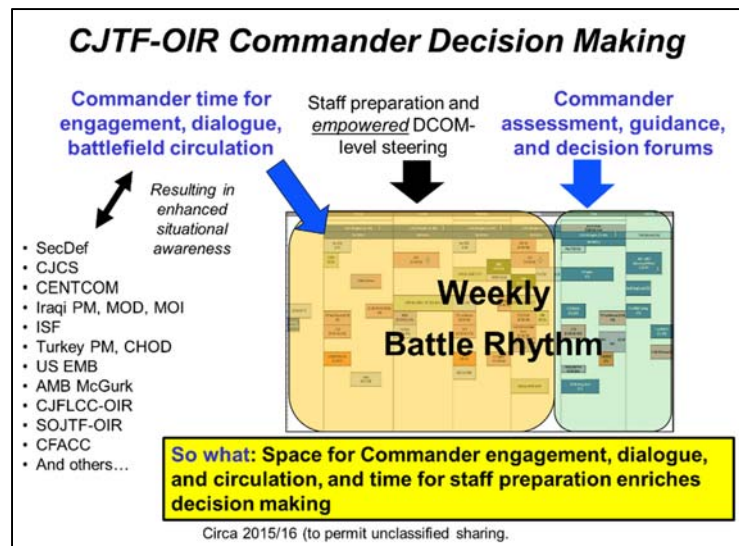


should have a structure and foundation for routine staff and unit level interaction, planning, and prioritization. Effective battle rhythms facilitate a smooth transition from steady state to crisis and back to steady state, without significant disruptions.

Special Staff and SMEs. Another important element of battle rhythm management is maintaining an awareness of critical staff positions that are in high demand for WGs and OPTs. High-demand/low-density (HD/LD) SMEs (e.g., POLAD and staff judge advocate) are important members of B2C2WGs but may not be able to support multiple simultaneous events. Identify manpower limitations of these key SMEs to ensure they are utilized effectively.

The Importance of White Space. “White space” is a necessary component of the battle rhythm. Most joint HQs make a priority of ensuring a portion of every day has no scheduled meetings – what they call white space. Without a conscious effort to preserve valuable time for both the commander and staff to reflect and work, the battle rhythm can become overwhelming and counterproductive. See the CJTF-OIR example on the adjacent figure.

We sometimes observe HQs where the principals and action officers find themselves going to a continuous progression of meetings, WGs, and other events. This may be accentuated when one B2C2WG extends beyond its prescribed time causing the next one to start late or be conducted without the necessary attendees. This timing is detrimental to a staff and the commander. The negative impacts on a “jam-packed” battle rhythm go beyond the commander and staff; they also affect subordinate and supporting units -- often with greater severity.

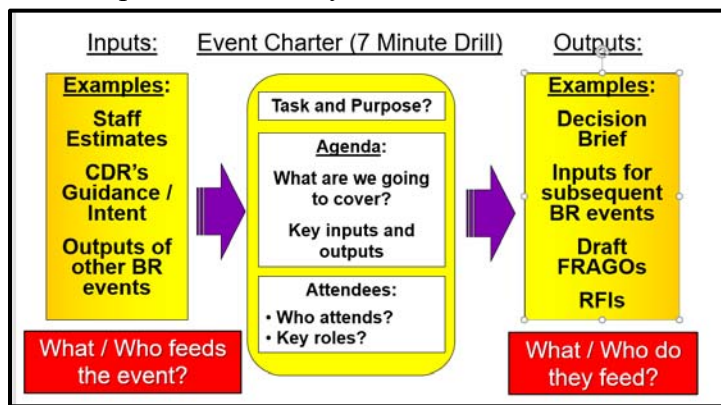


The commander requires time in the battle rhythm for reflecting, rest, and exercise. Time spent away engaged with subordinate units through battlefield circulation and reflecting is important. Staff members also need time in their day to conduct staff work, prepare to lead the B2C2WGs, and attend

to personal health and welfare. We have observed inefficient WGs when the participants did not have enough time to review the essential inputs, prepare an agenda, and determine expected outputs of the WG. In these situations, busy staff members find themselves wasting time and not contributing effectively to subsequent battle rhythm events and commander’s decision making.

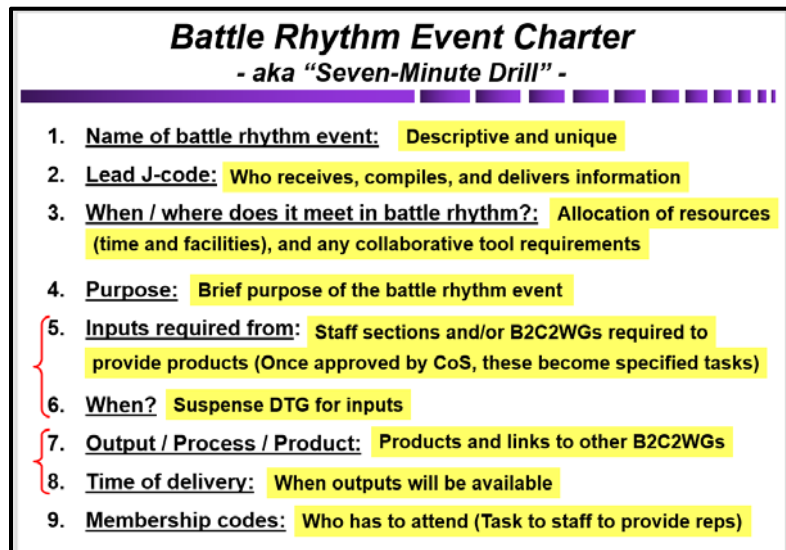
Responding to unplanned events is always a challenge to the battle rhythm. For example, when the Chairman of the Joint Chiefs of Staff or Secretary of Defense requires the CCDR and the JTF commander to participate in an unscheduled conference call, this event will pull the commander away from other scheduled events on the battle rhythm. The battle rhythm must be sufficiently flexible to provide needed support for the commander in preparing for the call and still have the battle rhythm function in the commander’s absence. We often see a deputy commander or COS standing in for the commander in regularly scheduled battle rhythm events.

Discipline in the Battle Rhythm. Battle rhythm discipline is necessary. We have found that the COS or another senior staff member with full authority over the battle rhythm is essential to disciplining the battle rhythm to best support the commander. The figure to the right highlights two considerations. First, the reason for having a battle rhythm event should be clear (i.e., have a task, purpose, and agenda). Second, identify inputs and outputs, providing a rationale and linkage for the B2C2WG within the critical path.



A best practice that we see widely used to discipline the number of events on the battle rhythm is ensuring each battle rhythm event has a “charter” or what many call a “7-minute Drill” (the name came from a past COS requirement to be able to explain the rationale for the event within seven minutes). We find this charter to be very effective in both describing and vetting battle rhythm events. The COS typically approves the charter; this ensures that the event has a necessary purpose with defined inputs and outputs. A proposed battle rhythm event that has no output and only provides generic situational awareness, or an information brief outside the decision making process may not belong on the battle rhythm.

The figures to the right and the next page are examples of 7-minute drill templates. While these particular formats do not contain a lot of details or key tasks, they clearly delineate the required information for a battle rhythm event. The key to these



charters or 7-minute drills is to use them. We frequently see commands with well-established charters struggle to conduct effective meetings because they do not adhere to their established guidelines.

We have observed many variations of 7-minute drills which depict more granular details to include multiple time zones including local, Zulu, AOR, and HHQ, the two-, three-, and four-star level CCMD events followed by other key B2C2WGs color-coded by command (including subordinates), and broken out by functional area. Other key elements include a means for tracking which events have changed, physical locations for B2C2WGs, and phone numbers or IP addresses for virtual meetings and Secure Video Teleconferences (SVTCs), and a signature block for the COS with a DTG stamp to give the event leader the authority to conduct the meeting.

7-Minute Drill Template – Quad Chart	
<p>Name of B2C2WG Event</p> <p>Purpose: Why? So What? Purpose of board, bureau, cell, center or working group</p> <p>Frequency: When, Day and Time</p> <p>Duration: Amount of time (minutes) allotted for meeting</p> <p>Location: Ensure size of room matches the number of attendees</p>	<p>Staff Proponent: Section responsible for the meeting (set up, coordination, minutes)</p> <p>Chair: Position and title of meeting chair</p> <p>Attendees: Sections / Units required to attend</p> <p>CMD GP Attendance: Who, if any, from the Command group attends</p>
<p style="text-align: center;">INPUTS</p> <p>Section / Unit Name: List of specific information needed from a specific unit prior to the meeting</p> <p>All Attendees: List of specific information needed from all attendees prior to the meeting</p> <p style="text-align: center;">OUTPUTS</p> <p>Section / Unit Name: List of updated product</p> <p style="text-align: center;">FEEDS</p> <p>List of B2C2WG events or other decisions/events this meeting provides information to</p> <p style="text-align: right; font-size: small;">UNCLASSIFIED</p>	<p style="text-align: center;">Portal Exploitation</p> <p>Products: Link to B2C2WG site on portal</p> <p>Techniques: Describe portal methods used to collaborate with team, i.e. Discussion Board, Shared Documents, Slide, Library, Wiki, Blog</p> <p style="text-align: center;">Meeting Agenda</p> <ul style="list-style-type: none"> • Roll Call / Minutes of last meeting • Responses to Due Outs from previous / updates • Review of upcoming suspenses / issues • New Action Items

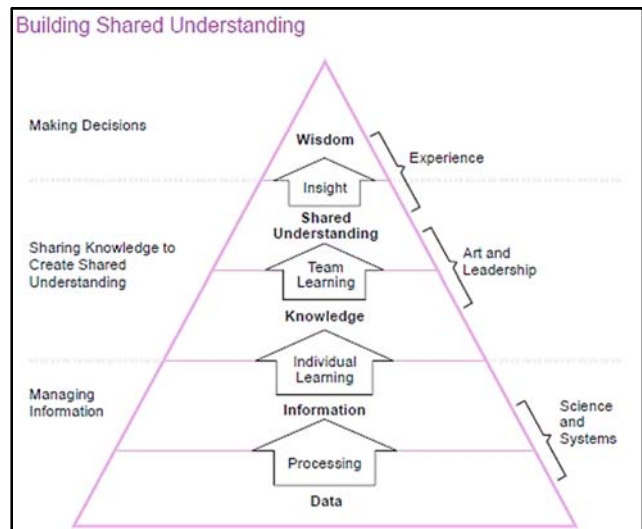
Many commands closely manage senior-level battle rhythm events, i.e. those attended by the commander, deputy commander, COS, J3, or J5 as “above the line” events. However, below the line events such as many of the WGs conducted below the one-star level often do not receive the requisite level of oversight or management by the COS. This has led to multiple “shadow” battle rhythm events scheduled at the same time creating “meeting fratricide”. Overlapping or concurrent “shadow” events create insurmountable challenges for directorates that do not have the depth of personnel to support simultaneous events. Likewise, in some cases there may be critical path misalignment in which a WG is conducted after the OPT or decision board that needs the WG’s information. This can result in delayed decisions and wasted time.

Insights and Best Practices:

- Identify the commander’s decision-making style, preferences, and touch point requirements early to frame the battle rhythm.
- Nest the battle rhythm with other HQs – HHQ, adjacent HQ, and subordinate HQs by identifying necessary anchor points (fixed higher HQ requirements or support to subordinates or mission partners.)
- Build the staff battle rhythm to support the critical paths of the various functions.
- Account for low-density high-demand SMEs in scheduling battle rhythm events.
- Retain flexibility to handle changes in mission requirements and HHQ demands.
- Provide predictability and maintain white space for circulation, reflection, work, and rest.
- Empower the COS to manage and discipline the battle rhythm, including vetting and approval of battle rhythm events through some form of a charter for events above and below the line.
- Establish a change mechanism for the battle rhythm that is agile and notifies participants of required changes in time or location of events.

5.0 KNOWLEDGE MANAGEMENT (KM). KM is important because it identifies and fills knowledge gaps, minimizes or eliminates stovepipes, captures knowledge and transfers it to those who need to know, helps synchronize a battle rhythm, and cultivates a culture of sharing across multiple staff organizations.

We find information management and knowledge management (IM/KM) are oftentimes confusing concepts in which both terms are sometimes used interchangeably. While IM is focused on tools, KM focuses on people, organization, and processes to make decisions and act. KM is the *supported* function and IM is the *supporting* function. The KM Officer (KMO), with guidance from the COS, is charged with supporting the commander’s information requirements from the staff and ensuring the staff’s decision cycle (battle rhythm and B2C2WGs) is properly aligned and focused on providing “knowledge” the commander needs in order to make well-informed, timely decisions. The IMO’s job is to work in concert with the KMO to ensure information and knowledge flow smoothly throughout the commander’s decision cycle.



- Rules**
- What do I know?
 - Who needs to know it?
 - How do I get it to them?

In addition to having a disciplined battle rhythm, we have observed the most effective staffs also have disciplined KM processes that enable close collaboration and cross-communication across all functions on a joint staff. Without a disciplined approach to KM, staff directorates tend to become more insular, knowledge becomes stove piped, and battle rhythm events become misaligned and disjointed. While B2C2WGs and OPTs promote a physical and logical interaction across J-code directorates at fixed points in time, effective KM processes promote interaction that horizontally and vertically spans internal organizations, HHQ, and subordinate HQs without time constraints. (See *Knowledge and Information Management Focus Paper*, May 2018, for more detailed discussion.)

Insights and Best Practices:

- Share how the commander wants to receive information and make decisions.
- Instill a culture of agile, flat, and fast information and knowledge sharing both within the HQs and with partners.
- Leverage Commander-led shared visualization sessions to enable mission command.
- Manage the sharing of knowledge through a Knowledge Management (KM) construct that develops and oversees roles and processes to support decision-making. We find the Chief of Staff is best postured to guide/manage knowledge sharing when he or she is personally invested in developing senior leader TOR and driving the battle rhythm.
- Assign responsibility for the development and oversight of tools and structure (IM) to share data and information across mission partners and within the HQs.

- Three types of information I need:
- Housekeeping type information to maintain my awareness
 - Decision focused information
 - Warning type of information that alerts/socializes me to potential future challenges.” - *Senior Decision Maker*

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Glossary

Abbreviations and Acronyms

B2C2WG – Boards, Bureaus, Centers, Cells and Working Groups	Element
C4I – Command, Control, Communications, Computers and Intelligence	JECC – Joint Enabling Capabilities Command
CCDR – Combatant Commander	JFC – Joint Force Commander
CE – Crisis Establishment	JIOC – Joint Intelligence Operations Center
CJCS – Chairman of the Joint Chiefs of Staff	JLOC – Joint Logistics Operations Center
CCMD – Combatant Command	JOC – Joint Operations Center
CMOC – Civil-Military Operations Center	JPSE – Joint Planning Support Element
COA – Course of Action	JPP – Joint Planning Process
COS – Chief of Staff	JP – Joint Publication
CSEL – Command Senior Enlisted Leader	JTF – Joint Task Force
DLA – Defense Logistics Agency	JTF-PO – JTF Port Opening
DOD – Department of Defense	JRSOI – Joint Reception, Staging, Onward Movement and Integration
DTD – Deployable Training Division	IM – Information Management
FEMA – Federal Emergency Management Agency	KM – Knowledge Management
HD/LD –High-demand/low-density	LNO – Liaison Officer
HHQ – Higher Headquarters	NATO – North Atlantic Treaty Organization
HQ – Headquarters	OE – Operational Environment
IO – Information Operations	OPT – Operational Planning Team
J3 – Operations Directorate of a Joint Staff	PA – Public Affairs
J33 – Joint Staff Current Operations Officer	PMB – Plans Management Board
J35 – Future Operations Cell of a Joint Staff	POLAD – Political Advisor
J4 – Logistics Directorate of a Joint Staff	SDOB – Secretary of Defense Orders Book
J5 – Plans Directorate of a Joint Staff	SecDef – Secretary of Defense
J6 – Communications System Directorate of a Joint Staff	SJA – Staff Judge Advocate
J7 – Operational Plans and Joint Staff Development Directorate of a Joint Staff	SJS – Secretariat of the Joint Staff
JCASO – Joint Contingency Acquisition Support Office	SME – Subject Matter Expert
JCSE – Joint Communications Support	SOP – Standard Operating Procedure
	SVTC – Secure Video Teleconference
	TOR – Terms of Reference
	USAID – United States Agency for International Development
	WG – Working Group



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