Better Training Begins Without PowerPoint

by COL Joseph E. Escandon

Some Army experiences remain with you for life. For Army officers who served as company commanders during the 1990s and early 2000s, one such experience may be the quarterly training brief (QTB). Many of today's generals and colonels earned their spurs, and scars, in this arena. The briefs shaped our leaders into expert trainers and our Army into a highly lethal force.

Back in the day, the QTB was part commanders' dialogue, part check on learning, and, most importantly, an experience that developed leaders into master trainers. The brief could be uncomfortable for a company commander, as he had to articulate an assessment of his mission-essential task list (METL) priorities and effective use of time and resources, all while communicating confidence that the plan was doctrinally sound. In effect, each commander had to convince the brigade commander that his unit-training plan (UTP) was worthy of approval.

The brigade commander's job was to ensure that the dialogue between commanders was at the graduate level of training. This ensured an effective UTP, but more importantly, it served as a critical professional-development experience for subordinates.

The result was a contract between commanders. Surviving this crucible meant company commanders earned ownership of their UTP. It was theirs to execute, lead and assess. When change was required, they were responsible for convincing superiors of the need. Brigade and battalion commanders had responsibility to support the training plans of their subordinates and, most importantly, to protect those plans. If they could not, their responsibility was to adjust priorities and then own the risk. This system built a high level of trust and cohesion at echelon.

In a recent article, GEN Paul E. Funk II, commanding general of U.S. Army Training and Doctrine Command (TRADOC), argued for the need to go "back to the future" by regaining mastery of another hallmark of the pre-war Army: training management. Among senior leaders, there is little doubt that the Army must improve the force's ability to manage training according to these tried and true processes. Nonetheless, there remains a problem that must be addressed before this imperative is able to achieve the desired results. Company-level commanders must be taught how to think about how to train, or more appropriately, how to think about the art of training. This skill is sorely lacking among our current field- and company-grade officers and our senior noncommissioned officers (NCOs).

Unfortunately, both current doctrine and experience in operational assignments fail to address the capability gap. Without an appreciation and understanding of the art of training, commanders cannot engage in an effective commanders' dialogue, nor can they implement the principals of training management. Understanding the problem and addressing it with the correct solution will require a paradigm shift in how commanders conduct discourse and the tools they employ to ensure success.

Highway to 'back to the future'

GEN Funk expressed the concern of many Army senior leaders: the need to return unit-training management (UTM) to its previous level of proficiency and effectiveness. He argued that this degradation is directly linked to the use of the Army Force Generation (ARFORGEN) model.

The demands of the Global War on Terrorism directed a readiness model (ARFORGEN) that effectively stripped us of our proficiency in UTM. It dictated top-down training so that brigade combat teams (BCTs) could meet the required gates for certification and deployment within the allotted time.[1]

In effect, ARFORGEN created an environment and a culture that significantly reduced a key pillar of effective training: leader experience.[2] Today's mid-level and junior leaders either do not use, or ineffectively employ, training-management doctrine and tools. Inexperience also contributes to a lack of "temporal discipline," which squanders training management's most valuable resource: time.[3]

GEN Funk highlighted the fact that keystone training-management tools, such as the long-range training calendar and the training schedule, are not employed or adhered to as they once were.[4] Hence, units are not executing the

highest quality training, thereby impairing readiness. He further noted that the requisite doctrine is well established, and training management occupies considerable time in various programs of instruction in TRADOC's leader professional-development courses.[5]

GEN Funk assesses that the real problem is centered on building competence and experience in the operational force.[6] In other words, unit commanders need to apply and enforce the doctrine, as practical application in the operational force is the key to success. Senior leaders recognize this shortfall and continue to engage leaders across the Army about the problem.

Unfortunately, the "back to the future" narrative has generated varying levels of skepticism and fatigue among junior leaders. Engage them in candid dialogue and you may glean that they have grown tired of hearing about their inadequacy when it comes to training management. This leaves senior leaders perplexed as to why the younger generation does not understand the importance of UTM. Why can't they seem to grasp the criticality and inviolability of the training schedule?

This critical question should immediately be followed by another question: Why is this so? My experience as both an infantry battalion and infantry BCT commander tells me that it is a lack of trust. Unfortunately, I often heard junior leaders question the value of training schedules: "Why spend all that time and effort to build a training schedule when it is just going to change?"

For senior leaders, this is absolute heresy! We grew up in an environment where changes inside the six-week lock-in required approval by the brigade commander. It was also an environment where senior leaders were the guardians of "temporal discipline." Unfortunately, over many years this atrophied, partly due to the requirements of back-to-back deployments.

Our ARFORGEN culture valued being able to do it all, and hence the training calendar became elastic. This was further reinforced by doctrine, which noted that "commanders aggressively train to overcome institutional obstacles that the Army's operational and personnel turbulence present."[7] If the Army aims to unburden company commanders, their rucksack packing list should not include bearing the burden of unnecessary institutional obstacles, persistent turbulence and an unfaltering "can do" culture.

Don't need roads; we need bridge

This underlies the root cause of the UTM problem. Cognitive frames built by varied experiences has left several generations of Army leaders talking past each other. Today's junior leaders, especially majors, lieutenant colonels and senior NCOs, are a product of one environment, the ARFORGEN environment. That is the base of their Army experience.

Generals, colonels and senior command sergeants major are the product of a different environment. They began their careers in an Army at peace, focused on training and training management. As junior leaders they did not have to contend with ARFORGEN, continuous combat deployments and the imperative to find a way to accomplish every task, regardless of time and resource constraints.

Senior leaders realize the effects of ARFORGEN and are committed to changing the paradigm. Unfortunately, today's battalion commanders and their subordinates do not have a second mental frame upon which to lean. For them, getting "back to the future" requires a cognitive leap of faith and a bridge to trust.

While my command experience resonates with GEN Funk's overall assessment, I firmly believe that before we tackle the issue of enforcing good training-management practices, we must start by building trust through the medium of the commanders' dialogue. Doctrinally, these forums are "truly dialogues and intended as points of discussion between the two commanders."[8] They serve to identify and make key decisions, approve training plans and commit resources.

Although not specifically stated, commanders' dialogues are key to developing subordinates. This keystone engagement between commanders must focus on building experience, not with the science of training, but with the art of training.

Company-level commanders generally are not challenged to use critical and creative thinking skills to solve the problem of training. Basically, they do not know how to think about how to train. This is not their fault, as ARFORGEN removed that requirement, and they never gained the requisite experience.

Ultimately, company commanders are the critical link for effective Army training. They not only apply training management, but they teach and enforce it at echelons below the company. This will also require some adjustments to doctrine, as our current doctrine does not enable the art of training.

Problem of training

The training logic chart in Army Doctrinal Publication (ADP) 7-0, *Training*, states that the purpose of training is to "Prepare Soldiers and units for conducting decisive action, guided by mission command and the following principles, processes and procedures."[9] ADP 7-0 lists four principles of training: (1) Train as you fight; (2) train to standard; (3) train to sustain; and (4) train to maintain.[10]

Training, like all operations, is executed through the operations process – plan, prepare, execute, and assess – using the procedures associated with UTM.[11] Achieving the purpose and applying the principles of training generates the problem of training, which is how to achieve and sustain training proficiency, given "limited time, resources and competing requirements."[12] Combined, these factors create a complex challenge for commanders. If UTM is the operational approach for solving the problem of training, its ability to do so is worthy of careful examination.

First, it is important to note that the Army does not possess a definition for training management. Therefore the term is inorganic to Army doctrine and can only be interpreted through examination of its key components.

Army training doctrine, as stated in ADP 7-0, "is founded on the concept that unit training is a logical extension of the Army's operations processes."[13] Hence, the process of planning, preparing, executing and assessing extends to training, as noted in the training logic chart.

The word "management" is defined as "the process of dealing with or controlling things or people."[14] Training management, then, is the control of training through the management of planning, preparing, executing and assessing. Tools or procedures such as training schedules, the Combined Arms Training Strategy and the Eight-Step Training Model enable leaders to effectively manage training.

While it is necessary for leaders, especially commanders, to manage the complicated aspects of training, solving the complex problem of maintaining proficiency, using the scarce resource of time and balancing risk requires leading change by applying both science and art. Science, defined as "a systematically organized body of knowledge on a particular subject," is applied to the problem in terms of experience, process and procedure to manage the complicated aspects of training.[15]

For example, the Eight-Step Training model exemplifies using process to account for the complicated aspects of scheduling and resourcing training.
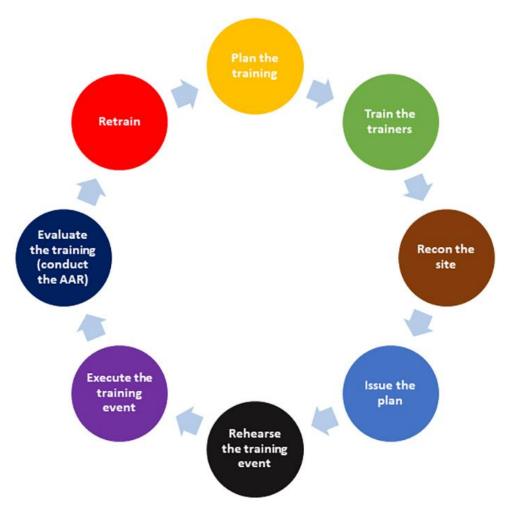
Figure 1. The Eight-Step Training Model.

Art, on the other hand, is required to deal with the complex nature of training. Art is defined as "works produced by human creative skill or imagination."[16] This is the realm of the commander, and something that only the commander can do, as he/she attempts to train to standard, usually in an environment bereft of dedicated open, or white, space.

Complexity can be found in balancing training with a multitude of administrative requirements, assessing how to maintain proficiency when time will only allow for a leader professional-development session, or maximizing multi-echelon training without creating an environment that tries to do too much and fails to train to appreciable standards.

The commander's use of creativity and imagination to train in an environment that requires Soldiers and units to be ready to fight tonight is well beyond the scope of training management. It resides in the realm of the art of training or thinking about how to train.

Framing art of training

While training doctrine does not prescribe or describe the art of training, we can lean on training's linkage to the operations process and operational art to refine our understanding. Operational art is codified in Army doctrine, and it is defined as "the cognitive approach by commanders and staffs – supported by their skill, knowledge, experience, creativity and judgment – to develop strategies, campaigns and operations to organize and employ military forces by integrating ends, ways and means (Joint Publication 3-0). Operational art applies to all types and aspects of operations. It integrates ends, ways and means while accounting for risk."[17]

Operational art applies to all operations, of which training is one. Hence, the term can be used to develop a framework for the art of training, its components and functions. Operational art seeks to answer these questions:

- What conditions, when established, constitute the desired endstate (ends)?
- How will the force achieve these desired conditions (ways)?
- What sequence of actions help attain these conditions (ways)?
- What resources are required to accomplish that sequence of actions (means)?
- What risks are associated with that sequence of actions and how can they be mitigated (risks)?

These same questions can be adapted and applied for use by company commanders with regard to how to train. More importantly, they serve as the framework for effective dialogue between commanders.[18]

Shortcomings of training doctrine

Army training doctrine is captured in two key documents: ADP 7-0 and Field Manual (FM) 7-0, *Training in a Complex World*. Unfortunately, both of these manuals reflect the top-down culture of ARFORGEN and reinforce GEN Funk's view that leaders were denied the ability to gain experience with training management because they "were handed a task list and resources, and told when and where. …"[19]

Leaders were also denied the ability to learn the art of training. Operational art is employed through the operations process, particularly in the activities of *understand, visualize, describe, direct, lead* and *assess*. This is where commanders seek to understand the problem and employ critical thinking and creativity to develop a solution.

ADP 7-0 addresses training through these lenses, but in a very limiting way, reinforcing the top-down model. According to ADP 7-0, a commander achieves *understand* by reviewing "the next higher commander's training guidance to determine the tasks and weapons to be trained."[20] Similarly, commanders *visualize* "how their units should conduct training based on their understanding of the next higher commander's training guidance."[21]

This is further codified in FM 7-0 as top-down guidance and bottom-up feedback.[22] While commanders must understand intent one and two levels up, these descriptions limit their role to simply understanding the plan of their boss and executing accordingly. This does not emphasize the subordinate commander's role. While FM 7-0 limits initiative, it nonetheless, and illogically, attempts to remain nested with mission-command philosophy, citing the need for commanders to promote "freedom of action" and "encourage subordinates to take action, accept prudent risk to create opportunity and seize the initiative."[23]

Regardless of this mixed message, company commanders absolutely need to understand their role in thinking about how to train. If they search ADP 7-0, fortunately they will find a section that advocates for the commander as central to unit training, just as in the operations process.[24] This section directs the commander to develop a training plan based on his/her conduct of a task review, determination of objectives and development of a strategy.

Interestingly, these are the elements of operational art and therefore the art of training. The activities of *understand*, *visualize* and *describe* are how the commander contributes to the fight at his/her level. Company commanders will never be able to participate in effective dialogue with their superior commanders if they understand their role as simply one of nesting and executing the plan of a higher echelon, and thereby they will never be able to execute effective training management. After all, the job of a commander is to support two levels up but to also do what his/her own unit requires.

Finding overlap and commonality is key. As GEN Funk points out, commanders need to learn how to leverage other people's training.[25]

Both doctrine and common wisdom tell us that experience weighs greatly in training management. Building that experience comes from the practice of training management in operational units. While TRADOC can provide the basic building blocks of doctrine and education, these tools need to be applied in actual practice. To understand how that practice is developed, it is worthwhile to examine how most battalion QTBs are executed because they are the starting point for training management. They are also the primary vehicle for commanders' dialogue, and as such, they reveal much about the level to which commanders think about how to train.

QTB as commanders' dialogue

While commanders' dialogues can be conducted at many key points such as training meetings and evaluations, the QTB remains the primary vehicle. Generally, QTBs retain the same basic format, with the battalion commander briefing his/her training plan, followed by each company commander briefing the company plan.

The primary method for the briefing is PowerPoint, with each commander generally provided five slides. The agenda for each briefer follows a basic agenda:

- The first slide usually covers the unit METL, and it provides an assessment for each task and a projected assessment for the end of the quarter. In many cases, there is a bulletized list of training events that will enable the unit to improve its overall rating of trained, partially trained or untrained.
- The second slide usually presents the unit's training calendar in a bar-graph-like picture that outlines the training plan in big blocks over large time horizons.
- A third slide is normally set aside to highlight the centerpiece of that quarter's training such as squad live-fires, an air-assault operation or sustainment field-training exercise.
- The fourth slide provides an overview of the proficiency of key individual tasks such as marksmanship, physical fitness and other critical skills.
- The last slide is usually reserved for the unit leader professional-development program. Sometimes it's specifically designated for the unit's senior NCO to outline the NCO-development program.

While the format and agenda of the QTB have not significantly changed over several decades, the quality and focus of the dialogue between commanders has greatly degraded. Largely the result of ARFORGEN, it is further exacerbated by the use of PowerPoint.

Over the years, the ability of company commanders to articulate an understanding of their METL assessment, of the training problem to be solved, and their visualization and description for how they will organize training has appreciably diminished. In the trained and ready aspects of the ARFORGEN process, units typically reached a fully trained status in their mission-essential tasks before deploying.

Subsequently, subordinate echelons seemed to reach the same assessment as their higher echelon. Given that all training stemmed from a centralized plan, it was logical for the assessments to be the same, although it really became a self-fulfilling prophecy.

Centralized planning and a time-constrained environment also resulted in a parallel degradation of the ability of company commanders to produce detailed training plans. This meant that, over time, a generation of company commanders gained neither experience nor the professional development required for how to think about training.

As training in ARFORGEN was executed in a highly time-constrained environment, so was the QTB. This issue was further exacerbated by the use of slides, which Annex G of FM 7-0 prescribes as the medium for the brief.[26] Given the nature of centralized METL assessments, as previously described, the METL slide often failed to generate a serious discussion between commanders. In fact, company commanders became accustomed to delivering talking points aimed at what their superiors wanted to hear instead of discussing risk and its mitigation.

Also, training plans could be, and often were, produced right before the QTB. Subsequently, they tended to be purely conceptual, with the subsequent detailed planning either overcome by events or not planned at all. The resulting plans were then at the mercy of a time-constrained, task-saturated environment.

QTBs centered on PowerPoint and conceptual planning pose significant risk, not only to the effective execution of training but also to a rich commanders' dialogue that forces commanders to understand and build experience with the art of training. Ultimately, fixing the QTB requires ditching PowerPoint.

Changing paradigm

As currently structured, the QTB neither enables effective commanders' dialogue nor a deeper focus on the art of training. This not only impedes the professional development of junior leaders, but it ultimately stifles the Army's ability to improve the qualitative aspect of UTM and overall readiness. Energizing company commanders to start

applying the art of training requires a significant paradigm shift, which entails changing the nature of the environment.

Key to affecting this change is substantively revising the QTB from a product-centric format to a format that evaluates the ability of company commanders as master trainers. Key evaluation criteria includes the employment of critical and creative thinking, the use of detailed planning and the nesting of training plans. Such an environment will produce true discourse among commanders, resulting in desired outcomes such as the establishment of well-understood priorities, the effective use of time and resources, and the development of effective multi-echelon training. Finally, higher level commanders can underwrite risk and enter into a true contract with their subordinate commanders, thereby restoring trust.

As a BCT commander, my objective was to change the current paradigm. To achieve the outcomes previously described, I determined that the first and most important step in leading change was to remove PowerPoint from the QTB. This was decisive because the removal of slides focused commanders on the outcomes previously described, while at the same time ensuring that they did not lean on what has become not only an inhibitor of training but a crutch.

In my original concept I wanted to change the format as well as the physical environment. Therefore, each QTB started with a combat-focused physical-training event aimed at framing the QTB as a team-building event. Although I hoped to execute each QTB at a field-training site, time constraints often resulted in the use of conference rooms. While the effort to change the environment was not completely successful, the removal of PowerPoint still achieved the intended effect.

The next step was to find tools to not only replace the slide deck but to force commanders to think about training in the intended manner. The solution was using the Army Design Methodology (ADM).[27] Contrary to conventional wisdom, ADM is not for use solely by echelons above the tactical level. It can, and should, be used by all commanders to solve problems.

To focus on the art of training, I directed that company commanders use ADM to structure their problem of training and explain their solution. I wanted them to seriously examine their METL assessment in terms of where they were (current environment) and where they wanted to be at the end of the quarter (future environment).

Next, I wanted them to identify the problem to be solved to achieve the desired future state. As our doctrine notes, the problem is defined as "achieving and sustaining training proficiency," [given] "limited time, resources and competing requirements."[28]

Finally, I wanted commanders to develop an operational approach, or a concept, for how they proposed to structure training to achieve the objective. In doing so, they had to consider the training guidance from higher-level commanders as well as activities that are generally viewed as training distractors, such as maintenance, property inventories and readiness activities. Of course, all of these are, and should be considered, training.

While the outputs of ADM can be displayed on PowerPoint slides, generating truly effective commanders' dialogue requires two key ingredients. First, brigade and battalion commanders must have a deeper understanding of the thought behind a company commander's training plan. This understanding is achieved when company commanders clearly articulate answers to key questions. For example:

- Has the company commander conducted the necessary level of detailed planning to make his/her training plan feasible?
- Does the plan reflect priorities and not try to do everything?
- Does the plan account for all tasks that the unit must execute such as readiness requirements, taskings, etc.?

Secondly, senior commanders must be able to evaluate their own understanding of the environment based on what their subordinates communicate. In this way senior commanders keep themselves accountable for their own plans.

- Are the BCT priorities understood?

- Do the BCT and battalion training plans provide ample time and resources for companies to focus on the basics?
- Has the BCT commander designated who owns which fights (training and administrative requirements), and shaped those fights so subordinate commanders can achieve success?

To shape the environment to enable commanders' dialogue, I required subordinate commanders to show their homework in writing. Prior to a QTB, the battalion commander and each company commander were required to write a memorandum (five pages for battalion, three pages for company) that used the ADM to outline their quarterly training plan. Each element also produced a detailed training calendar (in Microsoft Excel format) that provided the specifics of their plan, thereby showing their effective use of time and their logical progression for achieving their objectives.

Prior to the QTB, I reviewed these products and was prepared to discuss each unit plan, preparing specific questions aimed at identifying shortfalls but also highlighting effective approaches. In this way, I provided each company commander with tailored professional development to advance his/her understanding of the art of training and guide him/her to becoming a master trainer.

Build it; they will come

So what were the results? Did this strategy achieve the desired output?

This approach had a rocky start, as the new paradigm was unfamiliar for all, and it took some time to produce the desired result. After the first year I assessed that considerable work remained to remove the effects of ARFORGEN. Even after a couple of iterations without slides, company commanders continued to communicate their plans in snappy talking points, focusing on what they thought the boss wanted to hear as opposed to articulating their understanding of intent (i.e., training guidance) two levels above, presentation of their problem of training to be solved, and finally, their approach to solving the problem. In terms of METL, the assessment usually resulted in a "trained" in every task, regardless of whether that was even achievable. Training plans remained bereft of detail.

In the second year, things began to change appreciably as a result of the requirement for commanders to display their writing, cognitive and persuasion skills. Combined with a robust commanders' dialogue and a focus on professional development, company commanders began to show they understood their unit's true level of proficiency, where the unit needed to improve and how they planned to solve the problem. Commanders also displayed the ability to identify what they were not able to reasonably accomplish. They began to acknowledge that they could not do it all, what they saw as the critical tasks, where they had to accept risk and what they could do to mitigate that risk. Subsequently, detailed planning began to improve. Most importantly, company commanders began to take ownership for their training.

This experience revealed that a generation of Army leaders were not challenged, let alone trained and developed, to think about the problem of training, and then to own that problem through the use of art and science. In combat or a field-training exercise, we expect company commanders to solve tactical problems through critical and creative thinking. We should expect the same for their approach to training.

The mission of senior leaders, then, must be to provide an environment that sets the conditions for company-level commanders to have ownership of their training, build a base of expertise and train their subordinates to think about how to train and employ the tools of UTM. Unit training management will only be embraced in a priority-focused environment that facilitates management. This means eliminating the ARFORGEN culture that valued "doing it all."

Fortunately, Army senior leaders recently provided new strategic direction through the **Action Plan to Prioritize People and Teams**. This directive seeks to "reduce [operational tempo] … and reduce requirements to provide leaders additional time to invest in their people."[29] This includes reviewing readiness policies, manning and prioritizing training plans focused on building proficiency at the company-and-below level. Most importantly, the guidance's ultimate objective guidance is "aimed at achieving trust throughout the chain of command."[30]

Developing commanders in the art of training will generate the kind of discourse that will restore trust. All senior leaders need to do is build an environment and a culture that enables company-commander ownership of training. Effective UTM will follow.

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Notes

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Acronym Quick-Scan

ADM – Army Design Methodology
ADP – Army doctrinal publication
ARFORGEN – Army Force Generation
BCT – brigade combat team
CWMD – Countering Weapons of Mass Destruction (Adviser Course)
FM – field manual
GPO – Government Publishing Office
METL – mission-essential task list
MMAS – master's degree in military art and science
NCO – noncommissioned officer
QTB – quarterly training brief
TRADOC – U.S. Army Training and Doctrine Command
UTM – unit-training management
UTP – unit-training plan