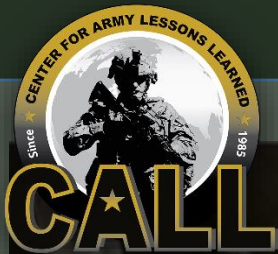


NEWS FROM THE FRONT

January 2019



Knowledge Managers Perspective

**Creating a shared working environment: Insights from LTC Andrew Dugger
Knowledge Management Officer in Charge
III Armored Corps & CJTF-OIR**

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News from the Front:

**Knowledge Manager's Perspective – Creating a Shared Working Environment:
Insights from LTC Andrew Dugger KM OIC, III Corps & CJTF-OIR**

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EXECUTIVE SUMMARY

The Center for Army Lessons Learned conducted a key leader interview (KLI) with LTC Andrew Dugger, Combined Joint Task Force – Operation INHERENT RESOLVE (CJTF-OIR) and III Armored Corps Knowledge Management (KM) Officer in Charge. LTC Dugger facilitated the evolution of the CJTF-OIR headquarters (HQs). The U.S. Central Command directed CJTF-OIR to reduce its size while consolidating the Combined/Joint Force Land Component Command (CJLFCC)-OIR. The task resulted in the nesting of two unique battle rhythms while providing uninterrupted processes the operational tempo required to continue operations in theater to support operations in the greater Levant.

This News from the Front (NFTF) is a transcription of the KLI covering various topics ranging from issues requiring leaders to rethink training and skills among KM soldiers, programming or coding skills (not typically found in the U.S. Army training curriculums), and Scrum Master certification.

Key takeaways:

Minimize duplicative processes. Refining processes and procedures to maximize SharePoint provided the HQ one-calendar that is accessible from three different places: SharePoint, Outlook, and a Dashboard.

Standardize SharePoint ownership. The Army needs to examine how it is sourcing SharePoint training across the Army and identify a standard responsibility for who owns the SharePoint portals.

Placement of KM Specialist. Sustain the best practice of placing the KM Specialist under the chief of staff (CoS). This is reinforced in Army doctrine and modified table of organization and equipment (MTOE).

Outstations. In a distributed environment, the staff must account for outstations in the battle rhythm. The CJTF-OIR meeting planning is a deliberate event to prevent forgetting outstations because it is easy to assume everything is coordinated/locked in.

These items address the adaptability and flexibility inherently needed in military operations. Additional details and insights are included within the base document.

<p>Front Cover: New command center builds stronger relationships between Iraqi and coalition leaders, December 28, 2015. (U.S. Army photo by Staff Sgt. William Reinier)</p>

What insights do you have regarding transitions to a single HQs and a smaller footprint, sourced by a single Army HQ?

The process to transition to a single headquarters started on Thanksgiving Day 2017, when the CoS asked the staff to start planning the headquarters merge with an Initial Operating Capability (IOC) date of 12 February 2018. The CoS placed this planning event in the CJ35-section so that an integrating staff could focus on the battle rhythm. The portion of this process where I have the most understanding is the battle rhythm merge. The insight I have is that [when] you have two different organizations with their two different functions where the CJTF focused on “up and out” (CJTF to CENTCOM and Office of the Secretary of Defense (OSD) (operational to strategic)) and CJFLCC focused on “down and in” (operational to tactical). The CoS chaired each planning event output briefing and brought the Council of Colonels (COC) together numerous times to ensure that all aspects of the new battle rhythm were addressed by directorate and sub-directorate perspectives. An example of the emphasis the CoS placed on this planning effort was how the OPT conducted a War Game, and after those results were socialized to the COC, there was an O6 war game.

The CoS stated many times that “if” there was any risk, the planning team would accept risk on the “up and out” functions and no risk on the “down and in” functions. To emphasize this, the CJTF JOC was moved from Arifjan to Union III to ensure the “down and in” functions were accomplished. The command post (CP) in Kuwait became the Support CP, the CP in Erbil became the Tactical CP, and the CP at UIII became the Main CP. The CJTF staff was comfortable with CJTF to components but not as comfortable with the new perspective of doing both “up and out” and “down and in” due to the number of subordinate elements (59) with one battle rhythm. Headquarters-evolution (HQ-E) caused us to relook our task organization (FUOPS lead), reducing the number of subordinate (Direct Reporting Units) from 59 to around 15. We understood “up and out” because that was our core function. Information from the staff flows up the chain of command and outside the organization to CENTCOM or different government agencies. However, there was a lot of work to get our arms wrapped around “down and in” because that was CJFLCC’s role.

Now the HQ had to work both roles. Also, we wanted to make sure we did everything possible to reduce or minimize any issues when it came to the new merged HQ battle rhythm. The scope of this challenge was that we took 96 CJTF battle rhythm events and 87 CJFLCC battle rhythm events and merged them into 144 events at the time of IOC in February 2018. When HQ 3.0 is finished being implemented, the HQ will be approximately the number of personnel from the original CJTF but conducting 1.5 times the number of meetings or battle rhythm events to fulfill the “up and out” as well as the “down and in” roles of HQ 3.0. In addition, CJ-KM led an effort to assess reporting and streamline the reporting process while allowing CUOPS to track all reports that came into and left the headquarters (subordinate units thru CJTF to CENTCOM). The two outputs from the reporting assessment was an updated consolidated reporting annex and a SharePoint solution that incorporated a reporting Dashboard on each classification enclave that provides “bins” for all reports by directorate with a calendar to facilitate CUOPS tracking. This effort resulted in discoverability of all reports to CJTF-OIR, the Command Group, and higher headquarters.

Define “up and out” and “in and down”

CJTF-OIR is a 3-star level headquarters with the responsibility of “up and out” coordination, synchronization, and integration of assets from CENTCOM, reporting to CENTCOM, other government agencies, and to Congress (operational to strategic). The “down and in” coordination, synchronization, and integration to support subordinate Task Forces with assets and reports and returns to accomplish their missions. Now, without a CJFLCC or 2-star division headquarters that focused on the “down and in”, we (CJTF-OIR) must also look “down and in” to disseminate information to the operational or tactical realm of the O6 task force commanders. One of the things that requires a lot more “down and in” (operational to tactical) is logistics which is a great example of this transition.

What were your challenges/successes with regard to Phase 1: Consolidate, Phase 2: Align, Phase 3: Re-balance?

We had to have the battle rhythm implemented with the start of the Align Phase per CG’s guidance. To do this our planning process required us to work backwards from the battle rhythm anchor points. We started from the CG’s decision point events on the battle rhythm and built the battle rhythm backwards in order to account for the “up and out” and “down and in” functions that lead to those decisions. This allowed us to nest all the meetings into swim lanes or critical paths to decision based on function. Initially we started with four swim lanes or critical paths for the CG’s decision points that were force flow, operations & targeting, assessments, partner force development and key leader engagements, and requirements and sustainment. Because we started in late November and had to have this IOC by mid-February we had to capitalize on the buy in from the leadership to maximize the opportunity to rewrite the battle rhythm and rewrite all the processes/tools that supported the battle rhythm. We briefed the CoS at least four times and the Deputy Commanders at least twice, which was a forcing function to get the staff through all these gates to a rehearsal of concept (ROC) drill ten-days prior to implementation. This challenge became a success when we took manual processes and digital duplicative process on Power Point and Excel and refined them maximizing SharePoint so we could provide the HQ one calendar that is accessible from three different places: Share Point, Outlook, and a Dashboard. Now you can find the 7-Minute Drills, post meeting notes or slides on the appropriate enclave depending on the classification of the information from 3 clicks from the front page of the CJTF-OIR SharePoint pages (Highlighted by MG (Ret) Fabre from the JS/J7 SAV MAY 2018 as a JTF best practice).

Another challenge was the availability of resources or conference rooms. About three weeks prior to the battle rhythm going live, we realized we hadn’t tied resources to events. This was a good epiphany and facilitated rebuilding the Union III (CJFLCC) conference room calendar and the CJTF (Arifjan (AJ)) conference room calendar. The team did a quick turn-around on rebuilding the conference room calendars starting from scratch with the goal of having every directorate and command group conference room availability on one site for AJ and one site for UIII. After the calendars were built, CJ-KM pre-populated battle rhythm events on the UIII and AJ calendars to force directorates to get used to a new overhead for each battle rhythm event which was coordinating for UIII and AJ conference rooms for each meeting. We refined the initial process with the directorates and provided a lock in date prior to the ROC drill with the

CoS. From the ROC drill to the IOC date, CJ-KM opened the calendars up to the Directorates in order for them to schedule internal meetings. Once the implementation date arrived, we removed the links for the old calendars and the new calendars went online. Surprisingly, the new battle rhythm implementation went off with only a few minor incidents, but no crashes. This success was due to the hard work of the entire staff and ensured that the new battle rhythm supported operations in Iraq and Syria. The HQ-E merged battle rhythm resulted in 144 events, one and a half times as many as before—but still fewer than the total number of events of the two separate HQs. However, due to rebuilding the management processes and access to information processes, CJ-KM was able to correct deficiencies, reduce friction points, and the end state is a new system that requires less time to manage the battle rhythm than the original processes.

Is there some skill or knowledge that would have been helpful to CJTF a year ago when you started the HQ Evolution planning?

If I had time to plan for HQ-E, I would've wanted a better understanding of project management and SharePoint implementation/capabilities. CJTF has the luxury of having a very robust contracted SharePoint team consisting of four Structured Query Language (SQL) developers and seven SharePoint front-end positions. The CJ-KM Deputy is an Italian Air Force IT officer. At home station, his position requires Program Management Professional (PMP) certification and Scrum Master Certifications. These are gates for project management in the civilian world. He also has coding skills and a great work ethic. I took the vision of our HQ on one battle rhythm calendar and an issue in the ability to link SharePoint to Outlook with current battle rhythm colors and categories (Each General Officer has a different color on the calendar) as well as a partial solution that one of the SQL developers had created and provided to the CJ-KM Deputy. So, with my vision and a broken power shell script, a US Army Officer returned a finished product in less than two weeks. He fixed the broken PowerShell script that allows the input of battle rhythm colors and categories into Outlook. This allowed us to get the HQ to one battle rhythm calendar and we started doing tests with the Secretary of the Joint Staff and senior leaders' computers to show we could get the HQ to one battle rhythm calendar. After this, we just ran with it by using the CJ-KM Knowledge Engineers to walk to every directorate and link all users to the battle rhythm calendar. We migrated as many people to one calendar as we could to reach the goal of shared understanding of the battle rhythm. What really made this work was the rework of all the systems for the battle rhythm during HQ-E. I call this one of the beauties of the coalition because we carried that into the merge of the battle rhythm and looked at every process from conference rooms to information flow. We knew we were going to be in a more distributed environment, which meant the digital system had to be functional and better than they were prior to HQ-E because in this environment the HQ had to be able to access information at any time in a distributed environment.

If I had known a year ago that I was going to have these kind of challenges, I would've worked to source shortages in technical training (SharePoint management and Project Management). Fortunately, I had a great team, but even when I was the Director of Army Knowledge Management proponent at Fort Leavenworth, there seemed to be something missing. For example: I think we need to look at how we are sourcing SharePoint training across the Army. There is not a standard responsibility of who owns the SharePoint portals. In some organizations, the "G" or signal folks own the portal, and in some organizations the KM owns the

portal. Both areas require subject matter experts to utilize the digital collaborative tools effectively to share information and support the commander in reaching shared understanding. How are we sourcing who is doing the myriad of tasks associated with SharePoint and KM tasks. What kind of training is necessary for KM? When I go back to III Corps, we have two contractors who cannot deploy to support SharePoint portals on non-classified internet protocol router network, secret internet protocol router network, and tactical networks. So who fills this technical void at the Division and Corps-level during a deployment if there is no pre-existing contract? What does the Corps or Division headquarters do? The three Corps headquarters are working solutions at each headquarters, but solutions involve contracting for SharePoint subject matter experts. This is a known issue at echelons above brigade that I believe needs to be addressed by the MCCoE and Cyber CoE.

I would recommend all Division KM sections contract for at least 2 SharePoint contractors and at the Corps level, contract for at least 5 SharePoint contractors. The reason for the large number of contractors is that in a mission partner environment, where there are multiple networks, SharePoint sites are broken out by classification resulting in 3 times the number of sites that units are used to operating at home station. Contractor support is critical to develop and sustain SharePoint sites where information can be shared and staff elements/subordinate units can collaborate.

In addition, KMO training on project management and change management are necessary aspects that need to be expanded other than just an overview class at the KM Qualification Course at Fort Leavenworth. Understanding how to keep a project on track that is being developed to resolve a requirement gap for the headquarters is a key function of a Knowledge Manager. Scrum Master training is a potential way to help resolve this training gap. Recommend having Knowledge Managers get certified in as a Scrum Master (<https://www.scrum.org/resources/what-is-a-scrum-master>)

What do you want to tell the rest of the Army regarding lessons learned?

I would say do three things: #1) Identify your KM section early in the training cycle is key. #2) The bigger piece is aligning the KM section under the CoS. The CJTF-OIR KM section would not have been able to accomplish the myriad of projects over the last year without being aligned under the CoS which is current Army doctrine and MTOE. At this time, there is not a definition for KM in joint doctrine. This needs to be resolved. By Army doctrine and MTOE the KM section is under the CoS and it works. #3) Resource the SharePoint SMEs to align to your mission. Also, if there is the ability to integrate Project Management (PM) whether it is Scrum Master training or PMP Certification. At a minimum Scrum and/or some sort of PM type of change management schooling should be integrated better into your KM section's training.

At the Army KM Qualification Course they conduct a block of instruction on change management, but could better address Project Management. Share Point is not taught at all. So this generates a division KM section, for example in OSS, who shows up to Kuwait and gets told he is going to manage and code the Division SharePoint page. This has to be on the job training due to never being taught SharePoint before. It happens all the time in COMPO 1, 2, and 3 units and this challenge should be addressed.

What is the operational impact to consolidation and ‘rebalance’ of HQs?

The operational impact for the staff is the number of outstations, in our distributed environment. The impact right now is it is easy to forget to dial in an outstation. Due to this, the CJTF-OIR meeting planning is a deliberate event to prevent forgetting outstations because it is easy to assume everything is coordinated/locked in. Operating in a distributed environment must be accounted for to conduct meetings from internal to external to battle rhythm events and clearly identify the people who need to attend. Establish an execution checklist to ensure all events have a conference room, dial-in info, and a VTC bridge is coordinated. Meeting and battle rhythm event planning is now a deliberate effort because of the distributed environment. This HQ had to get smart on digital meeting tools like Skype, Microsoft Link, and Defense Collaboration Services (DCS) to hold meetings or training events. For example, the foreign disclosure officer utilized DCS to train foreign disclosure representatives.

Do you have anything else to add? Any lessons learned or anything specific to HQ Evolution?

There are some very good technical lessons learned that we will write up for the CJTF-OIR lessons learned documents. We are one of the first HQs to use SharePoint for records management to become Department of Defense Instruction 5015.2 (DoD Records Management Program) compliant.

Processes put in place such as reporting Dashboards and battle rhythm processes need to be shared.

There are other aspects of the organizational touchpoints for KM that are best practices:

- Have Knowledge Engineers in the JOC (Day and Night).
- Have Knowledge Engineers from CIDNE in the CJ2.
- Have CIDNE FSRs in both JOCs (UIII and AJ).
- Have a MITRE contractor at AJ.
- Have SharePoint SMEs at the CJTF-OIR Main and Rear HQs

The MITRE contractor allows us to throw strategic-type of problems at them; like the harder, Ph.D. level, long-term type process issues. For example, they are building a battle rhythm assessment support system. Right now there is not a materiel solution for digital battle rhythm assessment. The JECC (Joint Enabling Capabilities Command) is the SME on battle rhythm assessments, but they use Excel and stubby pencil method for their assessments. There is no current requirement from the JECC to develop a digital battle rhythm assessment tool. There is a requirement however from the Army KM Proponent and this HQ due to the volume of battle rhythm events. So some of the problems we throw at MITRE are those bigger, long-range projects. Having the ability to have long term projects worked by MITRE vice knowledge engineers or individuals in key staff sections provides flexibility for project management in a JTF. This allows the SharePoint team, who can implement or build almost anything a Senior Leader can visualize has been a powerful mix to tackle projects and bridge gaps for this HQ.

BG Kamper asked us to build a force management tool. To build this tool, we needed a SQL database. We chose CIDNE WEBTAS due to the capability of not only having an existing SQL structured database, but also the web interface for display. This is a non-standard use of CIDNE WEBTAS to visualize units and aggregate capability across the CJOA. This system pulls from our daily status report (DSR) for the HQ and integrates the DSR Dashboard, which is an output from deployed theater accountability system, from subordinate units. This tool, even though it is a nonstandard use for WEBTAS, is powerful system. The PM from CIDNE actually bought in and said we can use WEBTAS for this non-standard task. These are just a few of the best practices that are in place and only possible due to the contract team that supports KM in CJTF-OIR.

In addition, I recommend HQs develop a type of knowledge center (see below) for basic formats and information for the staff to reside. In CJTF-OIR, there is a constant churn of personnel and KM supports information flow/integration into the organization by providing how to guides for systems/tools available to the staff, basic Microsoft Office how to guides, and formats for the organization for key products (OPORDs, PowerPoint slide formats, memorandums, etc.).



Helpful Links

Welcome Aboard	Welcome Aboard Packet	Driving Directions in Kuwait	Account Packets	Know Your CJTF Cmd (Key Leader Chart)	CJTF-OIR Facebook	CJTF-OIR Twitter	Army MWR	Armed Forces Entertainment	AKO - Army Knowledge Online	Enterprise OWA Access (Select 'DOD-EMAIL' Cert)	CJ64 Help Desk POC(s)
Joint & Coalition	Coalition Acct Creation Process	Coalition Indoctrination Training	DTIC-Joint Electronic Library Online	JKO - Joint Knowledge Online							SharePoint Battle Drill Guide
OPs, Orders and FragO(s)	CJTF Staff Officer's Business Rules	Staffing Routing Slip	BICES Centralized Orders Center	CJTF-OIR Orders Production Center (SIPR)							Knowledge Mgmt SOP - NEW -
IMO "How-To" A	How-To Add People To Distribution List	US Account Creation Instructions	US Standard NIPR/SIPR Acct Request Process	Create Digital Signatures	Add/Remove Digital Signatures	Mailbox Size-PST Creation	Encrypt Email	PowerShell Patching	Sync Outlook with OWA	Export Emails to (PDF)	
IMO "How-To" B	Sync Outlook to Battle Rhythm Calendar	Send Ghost Email	FVEY/Non-FVEY Account Request	How To - Map A Printer	How To - Map A BICES Printer (CLICK)	How-To: Use the Snipping Tool	Phone Dialing Instructions	Requesting VoIP & SVoIP	How To "Organizational Boxes"		
IMO "How-To" C	III Corps' Account Creation	How To Use Software Center	Classification and Marking Guide	CROSS DOMAIN Solutions	"Virtual and Physical Mtg Support/Tools"	"How-To" Slide Library	DCS JAVA Fix				
Collaboration Services A	How to Transfer with TNE	(BICES)- TNE "How To"	CJTF-OIR PhoneBook "How-To"	Transfer a File with CDC	How to use ARMDEC SAFE	File-Transfer Cheat Sheet	NIPR-2-SIPR DOTS Transfer	NIPR DCS	How to use DCS		CONF-RM Seat Charts
Collaboration Service B	CYBER Trans (BICES)	How-To Use Lync (BICES) CLICK	"How-To" Use WebEx(BICES Only)	Remedy Ticketing System (SIPR)	How to use Remedy (CLICK)	Intelink	Combined File Transfer Service (CFTS)	Cross Domain Transfer (CDT)-SIPR			CJTF Staff Locations
Collaboration Services C	How-To MeetMe	MeetMe PH Numbers	How-To Use Skype for Business								
Map Symbology	Graphic Unit Symbols	Map Action - Iraq Maps	Map Symbols Library								CJTF-OIR Conference Room Booking (ALL ROOMS LISTED)
CIDNE	CIDNE Overview	CIDNE(INDURE) Datasheet	CIDNE(INDURE) Portal	Pix Login							
Adobe Acrobat (PDFs)	Digital Signature Guide	Editing in Adobe	Digitally Sign ADOBE PRO Docs								
Outlook	Manage Tasks	Share Your Calendar	Manage Inbox	"Out of Office" Message	Create and Manage Rules	Manage Contact Groups	Manage Signatures	Manage Appts & Reminders	Manage Meeting Requests	Update GAL	Link to Outlook
Word	Format Text	Add a Graph or Chart	Add an Image	Add/Remove a Watermark	Create A CJTF-OIR MEMO (Sect-8 of STF Off Bus Rules)	Track Changes and Comments	Create a Table of Contents	Manage Headers and Footers			
PowerPoint	CJTF-OIR Master Slide-Template	How To-Military Guide to Power Point	Slide Design Tutorial	Create Animation	Use Notes	Embed a Video	Manage Graphs & Charts	Manage Presentation Mode	Record Audio	Record Your Screen	
Excel	Basic Formulas	Merge & Center	Create Tables or Graphs	Format Cells	Filter Content	Sort Columns	Printing Issues				
SharePoint	Manage Alerts	Custom Views	Edit POC Roster	Manage Calendars	Working with Documents	Create Custom Views	Search for Content	SharePoint Permissions "How To"	MS TechNet Permissions Guide		
Defense Travel System	DTS 101	LogIN to DTS									
"Help Line"	MS Outlook Help	MS Word Help	MS PowerPoint Help	MS Excel Help	miSuiteHelp	Collaboration-A Help	SharePoint Help				CJTF SHAREPOINT KM Training
Color Legend	NIPR	SIPR	BICES	Coalition Link	Cross Domain & VTC	BICES / Coalition	CAC Required	Intranet Access Required	Bldg & Conf-Rm Diagrams	Conf-Rm Scheduler	SharePoint / KM

Figure 1: KM SharePoint Portal Page

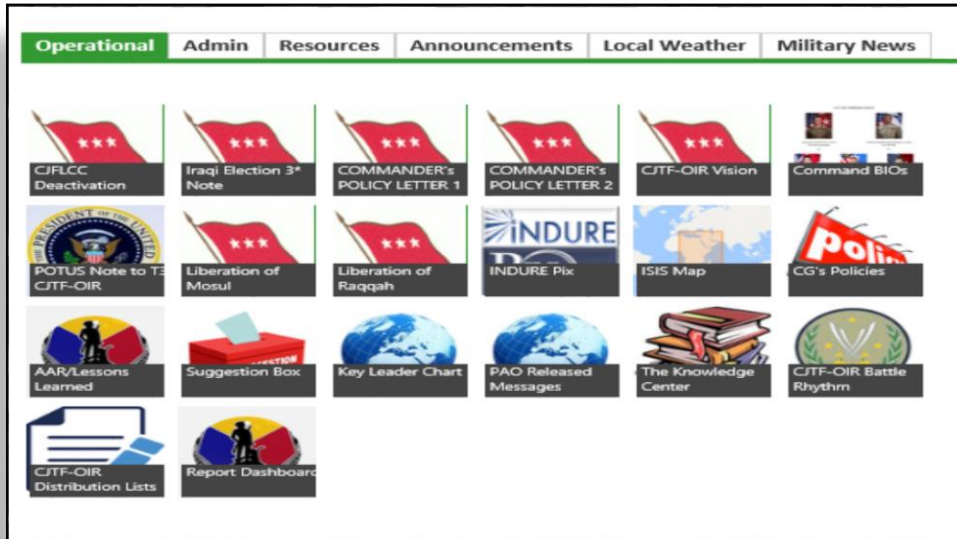


Figure 2: SharePoint Operational Function Tab

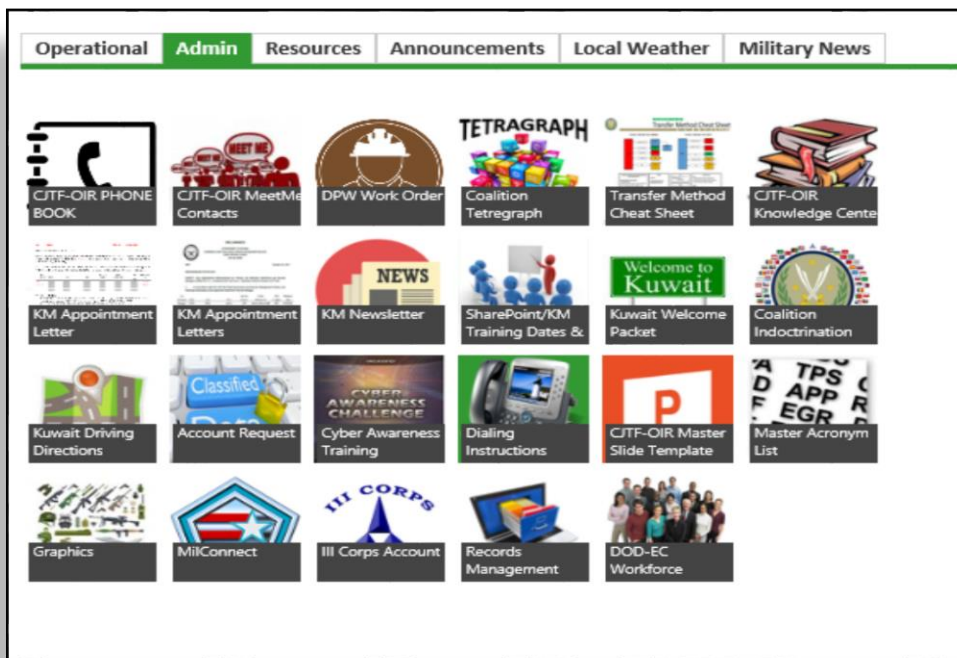


Figure 3: SharePoint Administrative Function Tab

Figures 1, 2, and 3 represent examples the CJTF-OIR KM team developed to provide the HQs easy access to a variety of information on SharePoint.