# Recruiting Brigade and Battalion Operations

## Table of Contents

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preface</td>
<td>iv</td>
</tr>
<tr>
<td>Chapter 1.</td>
<td>1</td>
</tr>
<tr>
<td>Overview of the Recruiting Brigade and Recruiting Battalion</td>
<td>1</td>
</tr>
<tr>
<td>Mission and Key Operational Capabilities</td>
<td>1</td>
</tr>
<tr>
<td>Organization and Capabilities</td>
<td>1</td>
</tr>
<tr>
<td>Brigade and Battalion Command Group</td>
<td>1</td>
</tr>
<tr>
<td>Brigade Headquarters Organization and Functions</td>
<td>3</td>
</tr>
<tr>
<td>Brigade Special Staff</td>
<td>6</td>
</tr>
<tr>
<td>Brigade Personal Staff</td>
<td>9</td>
</tr>
<tr>
<td>Battalion Headquarters Organization and Functions</td>
<td>9</td>
</tr>
<tr>
<td>Battalion Coordinating Staff</td>
<td>10</td>
</tr>
<tr>
<td>Battalion Special Staff</td>
<td>12</td>
</tr>
<tr>
<td>Summary</td>
<td>12</td>
</tr>
<tr>
<td>Chapter 2.</td>
<td>13</td>
</tr>
<tr>
<td>Recruiting Network</td>
<td>13</td>
</tr>
<tr>
<td>Network-Centric Recruiting</td>
<td>13</td>
</tr>
<tr>
<td>Internal Network</td>
<td>13</td>
</tr>
<tr>
<td>External Network</td>
<td>15</td>
</tr>
<tr>
<td>The News Media</td>
<td>15</td>
</tr>
<tr>
<td>Summary</td>
<td>16</td>
</tr>
<tr>
<td>Chapter 3.</td>
<td>17</td>
</tr>
<tr>
<td>Intelligence</td>
<td>17</td>
</tr>
<tr>
<td>Intelligence and the Recruiting Enviroment</td>
<td>17</td>
</tr>
<tr>
<td>Intelligence</td>
<td>17</td>
</tr>
</tbody>
</table>

Distribution: United States Army Recruiting Command; To be distributed in electronic media.
Distribution Restriction: Approved for public release; distribution is unlimited

* This publication supersedes UM 3-29, dated: 9 January 2018
Intelligence and the Targeting Process ........................................... 18
Recruiting Market Environment ..................................................... 18
Market Competition ......................................................................... 20
Running Estimates .......................................................................... 20
Information Collection ....................................................................... 21
Information Distribution ..................................................................... 21
Summary ............................................................................................ 22

**Chapter 4.** .................................................................................. 23
Planning .............................................................................................. 23
Planning - The Army Design, Operational Approach & Framework .... 25
Positioning .......................................................................................... 26
Mission Distribution .......................................................................... 27
Course of Action (COA) Development ............................................. 27
Adapting to Changing Circumstances – Branches and Sequels ............ 28
The Annual Operations Order (OPORD) Development Process ....... 29
The Target Process ............................................................................. 30
Targeting Working Group ............................................................... 33
Targeting Board ............................................................................... 35
Fusion Cell ......................................................................................... 36
Battle Rhythm .................................................................................... 37

**Chapter 5.** .................................................................................. 38
Decisive Operations ........................................................................... 38
Prospecting ....................................................................................... 38
Processing .......................................................................................... 39
Leading Future Soldiers .................................................................... 39
Summary ............................................................................................ 39

**Chapter 6.** .................................................................................. 40
Shaping Operations ........................................................................... 40
Inform and Influence Audiences – Inside/Outside their Organization ... 40
Lead Generation ................................................................................. 40
School Recruiting Program ............................................................... 40
Community Partners (CP) and VIP Development ......................... 41
A&PA ................................................................................................. 41
Training for Media Awareness ....................................................... 42
Summary ............................................................................................ 43

**Chapter 7.** .................................................................................. 44
Sustaining Operations ................................................................. 44
Fundamentals of Sustaining Operations .................................... 44
Sustainment .............................................................................. 44
Logistics and Supplies .............................................................. 45
Personnel Management ............................................................ 45
Soldier and Family Assistance Program .................................... 45
Training .................................................................................. 46
Risk Management and Safety .................................................. 47
Summary ................................................................................ 47

Appendix A ........................................................................... 48
Appendix B ........................................................................... 51
Appendix C ........................................................................... 55
Glossary ................................................................................ 57

Figures

Figure 1-1. Standard Recruiting Brigade Headquarters Organizational Chart ............... 3
Figure 1-2. Medical Recruiting Brigade Headquarters Organizational Chart ............... 4
Figure 1-3. USA Marketing & Engagement Brigade Headquarters Organizational Chart .... 5
Figure 1-4. Standard Recruiting and Medical Recruiting Battalion Headquarters Organizational Chart ................................................................. 10
Figure 1-5. Special Operation Recruiting Battalion Headquarters Organizational Chart ... 10
Figure 4-1. Planning Horizons – Operations Planning Process ......................................... 24
Figure 4-2. Planning horizons - Integration of plans, future operations, and current operations ................................................................. 24
Figure 4-3. The Army Design Methodology ......................................................... 25
Figure 4-4. Military decision making process (MDMP) ..................................................... 28
Figure 4-5. D3A methodology and the MDMP ......................................................... 32
Figure 4-6. College and High School Targeting Plan ..................................................... 34
Figure 4-7. Example Synchronization Matrix ......................................................... 35
Figure 4-8. For USAREC Targeting Planning Cycle ..................................................... 36
Figure 7-1. Three Domains of Training ................................................................... 46
Figure B 1. Generic Running Estimate Format ......................................................... 54

Glossary ................................................................................ 57
PREFACE

The successful execution of recruiting operations requires leadership and support; Brigade and Battalion Commanders organize and deliver that support. They serve as the link between the commanding general’s (CG’s) strategic vision and the forward edge of recruiting. FM 6-0, Commander and Staff Organization and Operations, provides commanders and their staffs with tactics and procedures for exercising mission command. This manual describes the U.S. Army Recruiting Command’s (USAREC’s) organization, functions, and operations of recruiting brigade and battalion staff for Regular Army (RA) and Army Reserve (AR) prior service, non-prior service (NPS), Medical Recruiting Brigade (MRB), Chaplain, and Special Operations Recruiting Battalion (SORB).

To comprehend the doctrine contained in this publication, readers must first understand the operational concepts and principles of recruiting as described in USAREC Manual 3, Recruiting, and the nature of recruiting operations as described in USAREC Manual 3-0, Recruiting Operations. In addition, readers must also fully understand the principles of mission command as described in ADP 6-0, Mission Command, and USAREC Training Circular (USAREC TC) 5-01, Mission Command and how those principles apply in a recruiting command environment.

PURPOSE

This manual provides commanders and staffs with many of the proven tactics and procedures associated with the organization, functions, and operations of USAREC brigade and battalion staff. This manual is a starting point for developing a shared understanding to facilitate ease of communication among various members of different organizations. Commanders may modify products and procedures as necessary to meet mission requirements and develop products more suitable to specific recruiting operational environments.

SCOPE

This publication describes the organization, functions, and operations of USAREC brigade and battalion staff and provides significant staff principles and staff processes. All staff personnel at battalion and higher levels should also read and understand manuals ADP 5-0, The Operations Process and FM 6-0, Commander and Staff Organization and Operations.

APPLICABILITY

This manual provides the foundation for brigade and battalion recruiting operations. USAREC Manual 3-29 applies primarily to commanders, staff officers, civilian employees, and noncommissioned officers (NCOs) at brigade and battalion levels. The base methods described in this manual comply with USAREC Manuals 3 and 3-0 and apply to all recruiting areas and markets.
INTRODUCTION
The content of this manual is not regulatory. The content is a compilation of strategies and field-proven methods that thoroughly explain the what, why, and how of essential activities at brigade and battalion levels. The methods detailed in this manual are the command’s best recruiting practices. They are not the remedy for every situation, but they do provide commanders a doctrinal starting point from which to plan and execute recruiting operations.

ADMINISTRATIVE INFORMATION
The proponent for this manual is the United States Army Recruiting Command, Recruiting and Retention College. Send comments and suggested improvements on Department of the Army (DA) Form 2028 (Recommended Changes to Publications and Blank Forms) directly to HQ RRC ATTN: RRC-D, 2389 Old Ironsides Avenue, Fort Knox, KY 40121-2725, or by e-mail to usarmy.knox.usarec.list.hq-rrs-doctrine@mail.mil.
(This page left intentionally blank)
Chapter 1.

Overview of the Recruiting Brigade and Recruiting Battalion

Leadership is the process of influencing people by providing purpose, direction, and motivation to accomplish the mission and improve the organization (ADP 6-22).

MISSION AND KEY OPERATIONAL CAPABILITIES

1-1. Recruiting brigades and battalions, unlike their operational counterparts, conduct continuous operations sustained by a multifaceted support structure. The primary tasks of the brigade and battalion command and staff are planning, preparing, executing, and continuously assessing recruiting operations while providing for the well-being of personnel assigned in a geographically dispersed organization.

1-2. Commanders, supported by their staffs, use the operations process (ADP 5-0) to understand, visualize, and describe their operational environment; make and articulate decisions; and direct, lead, and assess recruiting operations.

ORGANIZATION AND CAPABILITIES

1-3. USAREC is a diverse organization composed of cadre recruiting officers and NCOs (both volunteers and DA selected), staff officers and NCOs, DA Civilians, and contractors. Its primary mission is to recruit America's best volunteers to enable the Army to win in a complex world. This critical mission is one of the most challenging assignments in the Army. Refer to USAREC Regulation 10-1, USAREC Organization and Functions, for specifics on staff organization and responsibilities.

BRIGADE AND BATTALION COMMAND GROUP

1-4. The command group consists of a Commander, Executive Officer (XO) and Command Sergeant Major (CSM). In the medical recruiting brigade, the Deputy Commanding Officer (DCO) is included as a member of the command group.

1-5. Brigade and battalion commander. The commander's knowledge, experience, and personality determine how they will interact with their unit. Commanders affect the recruitment process through the command climate they establish, the extent and quality of training they provide, and their prioritization of operations. Everything that the commander demonstrates as important is important to the recruiting force and staff. Commanders play a key role in planning, and under Mission Command, the leadership tasks they perform are lead, understand, visualize, describe, direct, and assess during the military decision-making process (MDMP). They need to provide good 'guidance' and clear 'commander's intent' in the planning process and development of the commands operation plan. Guided by the commander's intent and the mission purpose, subordinate staff and leaders continue planning that will best achieve the commander's vision and accomplish the mission. They take appropriate action and perform the necessary coordination without needing new orders.

1-6. Commanders are responsible for everything that their staffs do or fail to do. A
commander cannot delegate this responsibility. The final decision, as well as the final responsibility, remain with the commander. When commanders assign a staff member a task, they delegate the authority necessary to accomplish it. Commanders provide guidance, resources, and support. They foster a climate of mutual trust, cooperation, and teamwork. Competent commanders know the best way to create a solid organization is to empower subordinates. Empowering subordinates does not mean omitting checks and only making necessary corrections. Leaders help subordinates identify successes and mistakes by ensuring they sort out what happened and why. A quality after action review (AAR) helps the team learn from successes and mistakes in a positive manner.

1-7. Brigade/Battalion Executive Officer (XO) and US Army Marketing & Engagement Brigade (USAMEB) Chief of Staff (CoS). The commander and CSM spend the majority of their time visiting, assessing, and assisting subordinate units. The XO serves as the commander’s principal assistant and frees the commander from routine details of staff operations and management of the Headquarters staff. The role of the XO is critical in allowing the commander to command the organization and focus their efforts on the brigade/battalion’s mission while the XO handles the day-to-day operations. At the battalion level, the XO also has primary oversight for the Recruiting Standards Program (RSP).

1-8. The XO, as the second in command, maintains the momentum of the unit and synchronizes operations. Their core competency is to support, interpret, and disseminate policies and plans to the staff and appropriate agencies. The XO leads the headquarters staff and provides for adequate training and development of staff personnel.

1-9. Deputy Commanding Officer (DCO) – Medical Recruiting Brigade (MRB). The MRB has a dedicated DCO assigned to its command team due to the unique national footprint, nature, and requirements of recruiting medical professionals and chaplains. The DCO assists the commander in leading and setting the conditions for medical brigade mission accomplishment through strategic planning and directing the execution of operations to recruit quality healthcare professionals and chaplains for the active and reserve components. The DCO is responsible for the Chaplin recruiting team and engagement with assigned medical, dental, and specialist corps liaison officers (LNOs).

1-10. Command Sergeant Major. The CSM is the senior enlisted advisor to the commander on matters pertaining to the organization. The CSM acts as the commander’s representative in supervising those aspects vital to operations as determined by the commander.

1-11. The CSM is generally the most experienced recruiter in the organization, and as such, is vitally important to the unit’s success. The commander and CSM engage in regular dialogue to stay in synch with where the unit is going and how it will get there. The CSM is the senior enlisted trainer and primarily responsible for training and coaching one level down and validating training and coaching two levels down. Additionally, the command sergeant major oversees the training of all subordinates,
ensuring that leaders at all levels provide the training necessary to accomplish the unit’s mission. The CSM attends and provides SME input to the targeting board and fusion cell process.

**BRIGADE HEADQUARTERS ORGANIZATION AND FUNCTIONS**

1-12. Brigade Organizational Structure:

![Standard Recruiting Brigade Headquarters Organizational Chart](image)

**Figure 1-1. Standard Recruiting Brigade Headquarters Organizational Chart**
Figure 1-2. Medical Recruiting Brigade Headquarters Organizational Chart
BRIGADE COORDINATING STAFF

1-13. The coordinating staff are the commander’s principal assistants who advise, plan, and coordinate actions within their area of expertise or recruiting function. Brigade coordinating staff consists of human resources (S1), market and mission analysis (S2), recruiting operations (S3), logistics division (S4), budget office (S8), Information management (S6), and advertising and public affairs (A&PA). All staff elements assist the commander with planning, organizing, employing, and sustaining the unit.

1-14. Human Resources (S-1). The S1 section plans, provides, and coordinates the HR support, services, or information to all assigned and attached personnel within the brigade and subordinate battalions and companies. The brigade S1 is the principal staff advisor to the brigade commander for all matters concerning HR support. The brigade S1 provides technical direction to subordinate unit S1.

1-15. Market and Mission Analysis (S2). The S2 is responsible for the collection and analysis of market data in support of resource targeting efforts. The analysis compares the brigade’s performance against market demographics, other service competitors, and the brigade’s past performance.

1-16. Recruiting Operations (S3). The S3 manages personnel on all matters pertaining to the various recruiting programs (officers and enlisted) of the subordinate battalions. S3s plan, direct, and coordinate operations of all subordinate recruiting activities to ensure maximum production in all procurement programs. They coordinate, conduct, and assist in market studies at brigade and battalion levels. They direct and monitor trainer requirements and the Recruiting Standards Program. Within the USAMEB, the S3 is dual-hatted as the S2. (Note: The XO at battalion level provides primary oversight for the Recruiting Standards Program).
1-17. **Logistic (S4).** The S4 is responsible for determining requirements for supplies, equipment and various services for brigade, battalions, and subordinate units located in multi-state areas.

1-18. **Information Management (IM) (S6).** The information management specialist advises the commander, staff, and battalion information managers on all technical issues. The S6 conducts formal information studies and mission analysis to determine information technology requirements and develops the recommended information architecture. The S6 recommends any major changes in the information architecture to higher headquarters and confers with the commander, staff, and users to obtain input on local information management requirements. They participate in the Information Management Working Advisory Group (IMWAG), which performs long- and short-range information management architecture planning and recommends information technology (IT) requirements. The S6 plans, integrates, coordinates, and evaluates brigade and battalion information requirements to develop and maintain their information architecture and management plan. The IM is the brigade advisor on all matters relating to information management hardware and software systems.

1-19. **Advertising and Public Affairs (A&PA).** The A&PA supports the brigade’s recruiting mission objectives through advertising and promotional activities. The A&PA develops, coordinates, executes, and monitors Army advertising, public relations, and recruiting promotion programs and provides technical assistance to subordinate units within the brigade.

1-20. **Budget (S8).** The S8 plans, directs, and coordinates the budgetary functions of the brigade and associated battalions.

**BRIGADE SPECIAL STAFF**

1-21. Every staff level has special staff officers. For the brigade, the special staff consists of Career Counselor, Equal Opportunity Advisor (EOA), Education Services Specialist (ESS), Soldier and Family Assistance Program Coordinator (SFAPC), Family Advocacy Program Coordinator (FAPC), SHARP Victims Advocate, Sexual Assault Response Coordinator (SARC), Behavioral Health Consultant/Clinical Psychologist, and Headquarters Support. During operations, special staff officers work in conjunction with the commander, DCO (in the MRB), XO, or their supervising coordinating staff officer.

1-22. **Career Counselor.** The Career Counselors are responsible for the management and execution of the brigade commander’s Soldier Retention Program. Located at the brigade headquarters, they provide career counselor service for all Soldiers within the brigade. They provide training to every Soldier and leader at least once a year regarding reenlistment options and career advice, generally during the annual training conference. The team processes all reclassifications, expiration terms of service, and immediate reenlistment prohibition transactions for the brigade. They provide separation counseling and process enlistment contracts for Soldiers who separate from the RA and join the AR or National Guard. The Career Counselors also manage the declaration of continued service statement processing, the Bar to
Reenlistment Program, Qualitative Management Program processing, and the retention inspection and staff assistance visits.

1-23. Equal Opportunity Advisor (EOA). The EOA is the commander’s subject matter expert (SME) on Soldier human relations issues. The EOA receives all formal and informal equal opportunity complaints and advises commanders on how to resolve them. The EOA conducts command climate assessments to check the state of morale, stress, and human relations issues, such as discrimination and sexual harassment, and provides information, training, and training assistance for all subordinate commands to reduce or eliminate occurrence.

1-24. Education Services Specialist (ESS). The ESS is a professional educator who serves as the commander’s advisor and education liaison. They interact with state level administrators and high-level secondary and postsecondary school officials to create a positive working relationship between the Army and the communities it serves. They advise the commander on education issues and makes recommendations to solve education-related recruiting problems. Lastly, they assist battalion ESSs to gain, maintain, and improve access to schools.

1-25. Soldier and Family Assistance Program Manager (SFAPM). The SFAPM is a member of the Brigade Wellness Team, and disseminates and implements policy guidance and regulatory standards as they relate to the supervision, development, and implementation of the Brigade’s Army Community Services (ACS) programs. The SFAPM serves as the commander’s actions officer and is responsible for independently supervising, researching, coordinating, and resolving problems encountered within the brigade related to the needs of Soldiers and Families within the organization. The SFAPM implements the Total Army Family Program, which seeks to improve the health, welfare, and morale of Soldiers, Civilians, and Family members. The SFAPM also serves as the Brigade Volunteer Corps Coordinator (BVCC).

1-26. Family Advocacy Program coordinator (FAPC). The FAPC is a member of the Wellness Team, and provides training and guidance to Brigade Staff, Command Teams, and Battalion SFAPM. The FAPC visits subordinate units and provides training on up-to-date program procedures and policies. The FAPC evaluates the effectiveness of the FAP by reviewing hospitalization reports, serious incident reports, and police blotters. The FAPC recommends the allocation of resources and provides budget guidance for the SFAPMs regarding FAP resource requests. The FAPC is the primary fund manager for all Department of Defense (DoD) FAP funds allocated to the brigade.

1-27. Behavioral Health Consultant (BHC)/Clinical Psychologist. The BHC is a serves as the OIC of the Brigade Wellness Team. The BHC is a licensed psychologist that provides support for the medical and behavioral health needs of the brigade. The BHC also helps promote organizational effectiveness and safety by providing consultation with commanders and senior leaders on policies, techniques, practices, and procedures that affect the organization and Soldiers. The BHC educates leaders in the identification of personnel exhibiting signs of stress and
facilitates referral procedures for Soldier evaluations. The BHC serves as a liaison between the command and medical treatment facilities for Soldiers who need treatment or are currently in treatment. The BHC is a primary resource to commanders for crisis management and intervention. The Mental Health NCO who assists in a wide range of psychological and social services and manages the logistics and coordination of travel plans for the Wellness Team in support of Annual Training Meetings, Wellness Team visits, battlefield circulation, etc., assists the BHC. The BHC is a functional component of the Office of the Command Psychologist (OCP) who provides local operational support to field units within their brigades.

1-28. Nurse Case Manager. The Nurse Case Manager is a member of the Brigade Wellness Team and is responsible for performing care management within the scope of licensure for Brigade Soldiers and Family members assigned and/or attached with acute, complex, and chronic care needs. The Nurse Case Manager performs care management by assessing, developing, implementing, coordinating, monitoring, and evaluating care plans designed to optimize member health care across the care continuum. They perform duties telephonically from scheduling appointments to discharge planning. The Nurse Case Managers duties include ensuring and coordinating recruiters’ access to services appropriate to meet their healthcare needs. The Nurse Case manager ensures accuracy and provides oversight of medical profiling procedures (temporary and permanent), generates and supervises the Warrior Transition Unit (WTU) packets, implement care plan by facilitating authorizations/ referrals as appropriate within parameters of TRICARE. They interface with Medical Directors and Physician Advisors on the development of care management treatment plans, negotiate rates of reimbursement as needed, and fully support the Behavioral Health Consultant (BHC).

1-29. Sexual Assault Response Coordinator (SARC). The SARC is a member of the Brigade Wellness Team, and acts as the Commander’s liaison, manages the Sexual Harassment/Assault Response and Prevention (SHARP) Program for the Brigade Commander. The SARC maintains direct access to the Brigade Commander as it pertains to providing information concerning unrestricted reports of sexual assault, and/or formal complaints of sexual harassment. The SARC emphasizes the commitment to maintain a workplace environment that rejects sexual harassment and sexual assault and attitudes that promote such behaviors. The SARC provides policy, guidance and other information for victims of sexual harassment and sexual assault, subordinate unit commanders, first responders, and those who seek to prevent or respond to sexual harassment and sexual assault. The SARC provides information to Soldiers, DA Civilians, and Family members at all levels, concentrating on systemic problems as well as individual problems. The SARC provides program direction and guidance to all concerning reporting procedures, confidentiality, training, safety tips, and resources. The SARC serves a permanent member of the installation Sexual Assault Review Board (SARB). The SARC ensures that sexual assault victim advocacy services are available 24 hours a day, 7 days a week, both on and off post, for all service members and other persons covered by the SHARP Program. The SARC serves as the primary funds manager for all Department of Defense (DOD) SHARP funds allocated to the brigade.
1-30. **SHARP Victim Advocate (VA).** The VA is as a member of the Brigade Wellness Team, and provides crisis intervention, referral, and ongoing non-clinical support to victims of sexual assault and sexual harassment. The VA ensures that victims of sexual assault receive all needed guidance and emotional support during administrative, medical, investigative, and legal procedures.

1-31. **Brigade Headquarters Support.** The Headquarters Support provides internal support for military, civilian, and contractor personnel in the areas of HR actions (evaluations, awards, in and out processing, promotions), supply actions and activities, and resource management.

**BRIGADE PERSONAL STAFF**

1-32. Personal staff officers work under the immediate control of, and have direct access to, the commander. By law and regulation, personal staff officers have a unique relationship with the commander. The commander establishes guidelines or gives guidance on when a personal staff officer informs or coordinates with the XO or other staff members. Some personal staff officers have responsibilities as special staff officers and work with a coordinating staff officer. Personal staff officers also may work under the supervision of the XO. The brigade personal staff consists of the Brigade Judge Advocate (BJA) and the Unit Ministry Team (UMT).

1-33. **Brigade Judge Advocate (BJA).** The BJA advises the commander, headquarters staff, and subordinate unit commanders on matters pertaining to military justice, administrative law, procurement, claims litigation, and improper recruiting practice actions. They coordinate with supporting installations and officials of other federal, state, and local agencies on legal issues that affect the brigade. The BJA also communicates directly with and receives guidance from the Staff Judge Advocate, HQ USAREC, on technical and legal issues.

1-34. **Unit Ministry Team (UMT).** The UMT advises the commander and staff on all matters of religion, morals, and morale. The chaplain evaluates the spiritual, ethical, and moral health of the command to include the moral and ethical quality of leadership and leadership practices. The chaplain provides Soldiers and leaders religious support through personal counseling, visitation, and performing marriage ceremonies and funerals. Traveling throughout the command the chaplain works closely with FAPCs and SFAPCs assisting with Soldier, Civilian, and Family issues.

**BATTALION HEADQUARTERS ORGANIZATION AND FUNCTIONS**

1-35. Battalion Organizational Structures:
1-36. The standard battalion coordinating staff consists of human resources (S1), market and mission analysis (S2), recruiting operations (S3), logistics management (S4), information management (S6), A&PA, and for the SORB only includes an assigned Resource Management Specialist (RMS) (S8). All staff elements assist the
commander with planning, organizing, employing, and sustaining the unit.

1-37. **Human Resources (S1).** The battalion S1 section plans, provides, and coordinates the delivery of HR support, services, and information to all assigned and attached personnel within the battalion. The battalion S-1 is the principal staff advisor to the battalion commander for all matters concerning HR support.

1-38. **Market and Mission Analysis (S2).** The S2 is responsible for providing timely and accurate intelligence analysis and products in support of the commander, subordinate units, and coordinating staff. The analysis is determined using the four primary S2 functions. The four functions are (1) Market intelligence and analysis, (2) positioning the force, (3) distributing the mission to the force, and (4) supporting the targeting process. Market intelligence alerts commanders to changes in the market and helps pinpoint the best time and place for operations while positioning the force and distributing the mission for success. Supporting the targeting process requires the S2 to provide market intelligence, which is the starting point for all targeting & fusion cell decisions. The S2 conducts the Intelligence Preparation of the Battlefield (IPB) in support of the MDMP process.

1-39. **Recruiting Operations (S3).** The S3 section is the commander’s primary staff element for planning, coordinating, prioritizing, and synchronizing all operations. The S3 uses data from various staff elements to develop the battalion’s Recruiting Operations Plan.

1-40. **Virtual Recruiting Station (VRS).** The Virtual Recruiting Station (VRS) facilitates decisive, shaping, and sustaining operations within the United States Army Recruiting Command using virtual platforms. Through content creation and digital marketing analysis in collaboration with market intelligence, the VRS are responsible for virtual lead generation, lead refinement, and prospecting through decisive targeting within the battalion area of operations. The VRS conduct shaping operations in support of the commanders’ intent to build relationships with community partners, promote and support Army events, and influence each generation of the American people. The VRS provides training and oversight to all personnel assigned to the battalion in virtual prospecting techniques, social media security measures, and regulatory guidance and compliance.

1-41. **Logistics (S4).** The S4 manages the battalion’s material assets and is the commander’s primary logistics planner, providing timely and accurate logistical information, and support to sustain continuous operations.

1-42. **Information Management (S6).** The S6 is the information technology specialist for the battalion. They are responsible for the technical aspects of automation and communications from battalion to recruiter levels. They maintain system security, password control, and accountability of all battalion hardware and software.

1-43. **Advertising and Public Affairs (A&PA).** The primary role of A&PA staff is to execute A&PA programs to support recruiting and accessions requirements. This staff section holds a wealth of institutional knowledge where all the market intelligence comes together and develops strategies to deploy resources to high
payoff targets. Ensuring the right message in the right market at the right time in the right language is essential for the success of A&PA campaigns.

1-44. **SORB Resource Management Specialist (SORB RMS) (S8).** The SORB is the only battalion staff that has a RMS assigned. The SORB RMS performs the same functions as that of the brigade RMS in that they perform budget management, accounting operations, travel administration. The RMS provides timely and accurate financial and personnel information required to support and sustain continuous operations.

1-45. **SORB Outreach Division.** The SORB has an assigned team of outreach NCOs that are assigned to major Army installations through the US and perform special missions’ activities in support of in-service special missions recruiting efforts.

**BATTALION SPECIAL STAFF**

1-46. The standard battalion has two special staff members consisting of the Educational Services Specialist (ESS) and SFAPM. The SORB battalion has an assigned Clinical Psychologist due to the SORB’s unique mission requirements. The SORB does not require an ESS nor do they have a SFAPM. Soldier and Family assistance for SORB members is provided by the hosting installation’s SFAPM.

1-47. **Education Services Specialist (ESS).** The ESS is a professional educator, action officer, and primary member of the battalion commander’s staff. The SORB does not have or requires an ESS. The mission of the ESS is to communicate Army training and education opportunities to the civilian education community and assist the recruiting force by gaining, maintaining, and improving access to the Nation’s high school and college students.

1-48. **Soldier and Family Assistance Program Manager (SFAPM).** The SFAPM serves as the commander’s actions officer and is responsible for independently supervising, researching, coordinating, and resolving problems encountered within the battalion related to the needs of Soldiers and families within the organization. The SFAPM is only assigned to recruiting battalions and MRBs.

1-49. **SORB Clinical Psychologist.** The SORB has an assigned clinical psychologist as part of the SORB special staff. The clinical psychologist travels throughout the command to support the behavioral health needs of the SORB. This includes performance enhancement and resilience of USAREC Soldiers and DA civilians the identification and understanding of the factors that adversely affect the morale of the force.

**SUMMARY**

USAREC and its subordinate elements have staff sections similar to other Army organizations. USAREC brigades and battalions also have staff sections with unique functions such as ESS, A&PA, medical professionals, virtual recruiting, and other staff members that have specialized skills and duties that are needed due to the unique recruiting operational environment.
Chapter 2.

Recruiting Network

“The world has a way of undermining complex plans. This is particularly true in fast moving environments. A fast moving environment can evolve more quickly than a complex plan can be adapted to it. By the time you have adapted, the target has changed.”

General Carl Von Clausewitz

NETWORK-CENTRIC RECRUITING

2-1. The recruiting environment is ever changing, and extremely demanding. Recruiting operations therefore should be flexible to market changes and the needs of the Army’s force structure and end strength requirements. For example, the requirement to increase the number of Middle Eastern linguists and target that specific market segment deviates in part from the planned mission based on volatile world events. Mission adjustments such as this can directly affect current decisive and shaping operations. Continuous operations demand versatile and adaptable units, led by commanders with those same attributes who are supported by staff members who understand internal and external recruiting networks. Each phase line brings a new mission with its own unique set of challenges. Mission success in this environment demands from its leaders the ability to act independently and the courage to make timely decisions.

2-2. Over the years, recruiting has embraced computer technology and today can boast of electronic enlistment forms, real-time market information, and daily production data. Technology, however, with its speed, new practices, and improved procedures will never fundamentally change Army recruiting or Army leadership. The recruiting and leadership fundamentals will never change. The Army’s strength depends on recruiters meeting with and sitting knee-to-knee; eyeball-to-eyeball with prospects, telling the Army story and engendering a commitment to join the Army. Recruiters depend on leaders who provide training, direction, and support that enable them to complete that mission.

INTERNAL NETWORK

2-3. USAREC Manual 3-0 Recruiting Operations states, “The internal network of recruiting is a family of human- and function-based systems that enable commanders and recruiting leaders to see first, understand first, act first, and finish decisively.” Intelligence from the internal network allows commanders to quickly resource and execute operations, customize strategies, and exploit opportunity within the target market.

2-4. Sustainment includes the staff elements at each level of command, to include the Recruiting and Retention College (RRC) that trains all recruiters and recruiting leaders. The RRC is an excellent model for internal networking activities. As recruiters and leaders go through their training, they have the opportunity to build a
strong network of peers. The smartest of the pack also develop professional relations and networks with subordinates and superiors while they are at the RRC or attending other events that bring them together with members of their profession.

2-5. The U.S. Army Marketing and Engagement Brigade (USAMEB) supports recruiting with mobile and fixed exhibits in order to generate interest in Army programs. They provide audiovisual and graphic support to the recruiting force and other DOD agencies. They provide marketing and incentive products to the recruiting force in the form of recruiting publicity items and personal presentation items. Army Adventure Semi mobile exhibits such as the Mobile Usability Lab Exhibit (MULE), Science, Technology, Engineering, and Mathematics (STEM), and Army Adventure/Special Operation Semis along with the Army Parachute Team and the Army Marksmanship Unit are assets. Commanders request assets based on targeting board results and current command guidelines. Commanders can also benefit from national ads and national-level events in their area of operations (AO).

- The USAMEB’s mission is to ensure connectivity to target markets and the Nation:
  - It promotes what it means to be a Soldier, emphasizing the Army’s warrior ethos and the expeditionary nature of our business.
  - It also displays special skills through competitions and demonstrations in local recruiting areas.
- The USAMEB prides itself as warriors helping recruiters generate target market leads that have a propensity to enlist or commission in the Army.

2-6. The Corps of Engineers is responsible for supporting our off-post facilities and real estate, such as, unit headquarters and recruiting stations. They handle leases, contracts, upgrades, and anything that has to do with off-post buildings and their maintenance. Where Soldiers go to work every day, and how the public perceives them is critical to our mission.

2-7. The U.S. Military Entrance Processing Command (MEPCOM) operates all military entrance processing stations (MEPS). These facilities exist solely to support the recruiting missions of all branches of the armed services. The MEPS administers all qualification testing, to include the ASVAB career exploration test given in schools.

2-8. The U.S. Army Cadet Command (Reserve Officers' Training Corps) as they are in the higher education markets, is a valuable source of information and intelligence. All leaders, as well as the ESS, should initiate a relationship with the local cadet commander to work together to accomplish their respective missions. Often recruiting commanders can collaborate on events planned and resourced by the Reserve Officers' Training Corps.

2-9. The Recruiter and Reserve Partnership Council (R2PC) serves as a forum to build partnerships, develop unit-recruiting plans, and resolve any recruiting issues. The R2PC is also a valuable part of the recruiting network. Soldiers in local troop program units are from the local area, so the introductions and information they
provide save valuable time, resources, and potential referrals. Troop Program Units (TPU) also have equipment and specialized personnel who can participate in a wide range of recruiting operations.

2-10. Military installations have the capability of displaying the Army to perspective Soldiers. The post public affairs office is a good source for information on the Army in general. They also serve as a resource for Soldiers and their families. These installations, however, have a separate mission and cannot always provide the assets desired. It is imperative that recruiting leaders tend to the relationships of leaders on these installations.

2-11. The RRC provides initial and advanced training in recruiting subjects for NCOs and officers. Commanders are required to provide personnel resources and participate in training courses.

EXTERNAL NETWORK

2-12. External network recruiting activities include the unified efforts at all levels, from recruiter to HQ USAREC. Recruiters synchronize their efforts with the civilian & military communities and institutions such as education, industry, military, and other governmental and nongovernmental agencies. Leaders at all these levels comprise the foundation of the recruiter’s external network. How the local community views and perceives the Army is a direct reflection of the local Army leadership. The external network is pivotal to the success of the unit.

2-13. This list of useful external networks is by no means an exhaustive list.

- Government and civic officials (the Civilian Aide to the Secretary of the Army Program, for example).
- Educators (state and local level secondary and postsecondary education leaders).
- Job Corps.
- Military schools, installations, and units
- Colleges and universities, including technical and vocational schools.
- Business leaders.
- Business and industry participating in the Partnership for Youth Success Program.
- Religious leaders.
- Other local community leaders and Community Partners.
- Youth and athletic associations.
- State and local employment services.
- Local print and broadcast news media.

THE NEWS MEDIA

2-14. It is the responsibility of all Soldiers and Army Civilians to tell the Army story as often as possible. In today’s environment, few military operations escape media presence. In our form of government, the media has the right to cover operations,
and the public has the right to know what the media has to say. Unfortunately, bad news often gets the majority of coverage. Many good things about the Army are unknown to the public.

2-15. The objective in dealing with the media is to present the Army in the proper light while keeping the public well informed. When speaking with the news media, Soldiers must understand what is classified and what not to discuss with the press. Soldiers should also understand that they are not required to talk to the media if it is against their wishes. All Soldiers represent the military and they must not guess or speculate on things they do not know. At a minimum, always seek Public Affair counsel before and when engaging with the media.

**SUMMARY**

2-16. The internal and external recruiting networks that form the information structure of a command are the source of intelligence information for building the brigade and battalion annual operations plan. Recruiting commanders tap into this flow of information to see first, understand first, and act decisively during every decisive, shaping, and sustaining operations.
Chapter 3.
Intelligence

“Information is a source of learning. But unless it is organized, processed, and available to the right people in a format for decision-making, it is a burden, not a benefit.”

William Pollard

INTELLIGENCE AND THE RECRUITING ENVIRONMENT

3-1. Commanders must have intelligence about the market, competition, operational environment (OE) and area of operation (AO) prior to engaging in recruiting operations. Recruiting commanders and staff have extensive access to data delivered with speed, accuracy, and reliability through advanced communications systems. Staffs collect, process, analyze, and evaluate data using the full intelligence process, (the collection, processing, integration, evaluation, analysis, and interpretation of available information relevant to the Army's recruiting environment) to determine the unit’s near and long-range relevance to the mission. Intelligence helps commanders visualize their recruiting market, organize their forces, and control operations to achieve the desired effect. Since the intelligence process is continuous, it can detect and monitor trends and events that affect the market. The intelligence process forms the basis for the military decision-making process (MDMP). Intelligence assists in the planning and developing of operations, positioning the force, mission distribution, and support of the targeting process. (See USAREC TC 5-02, Intelligence, for specifics regarding intelligence and market analysis).

3-2. Market intelligence, when applied properly, puts the recruiter on top of the target. Commanders can measure their achievements in various market segments against other services. It allows them to take appropriate action to reverse negative trends, maintain a strong foothold, or dominate their markets. With market intelligence, commanders can ensure recruiters are in the right market at the right time with the right message.

3-3. The XO manages, coordinates, and disciplines the staff’s intelligence work and provides quality control to meet the commander’s intent. They determine timelines for the staff, establish brief-back times and locations, and enforce the information management plan.

INTELLIGENCE

3-4. The centerpiece of the intelligence process is analysis of the battlefield (recruiting environment). Intelligence preparation of the battlefield (IPB) includes situation development, target development and support to targeting, indicators and warnings, order of operations, and assessment. All elements of the intelligence process are important. Staff must focus on the IPB process and how the MDMP relates to all recruiting operations. A more sophisticated and developed staff incorporates all aspects of market intelligence into their battle rhythm.
3-5. The IPB is a continuous four-step process that seeks to define the market environment, describe the market environment’s effects, evaluate the competition, and disseminate the findings of this process. Intelligence preparation of the battlefield also reveals information gaps that help focus on information gathering and analysis. Intelligence preparation of the battlefield provides a framework for the logical use of numerous analytic tools. As a doctrinal methodology, IPB is a flexible framework providing organizations with templates to help commanders visualize and analyze their particular market.

3-6. The IPB is the commander’s and each staff officer’s responsibility. The S2 cannot do the entire IPB without staff input. Intelligence preparation of the battlefield is a collaborative effort. The XO also provides any unique instructions to guide the staff in completing collaborative intelligence work and staff estimates. The XO must also facilitate and expedite collaborative work efforts to ensure the intelligence process is fully effective. All staff officers must assist the S2 in developing the situation template within their areas of expertise.

3-7. Initiate the MDMP and the Intelligence preparation of the battlefield processes upon receipt of the mission. Intelligence preparation of the battlefield is the first step of the MDMP. Once the initial IPB is complete, the S2 must develop the competition’s probable Course of Action (COA) for consideration. This “devil’s-advocate” approach should result in threat templates that help inform the commander on the competition’s most likely reaction to current and future market conditions.

INTELLIGENCE AND THE TARGETING PROCESS

3-8. Intelligence integration into the targeting process helps the commander identify when, where, and in what strength to deploy assets and resources. Intelligence support uses the targeting model as a starting point for target identification. IPB products should include both ‘top down’ and ground truth ‘bottom up’ market intelligence. High payoff and high value events and territories become evident through the targeting process.

3-9. Intelligence is the critical component of the planning and targeting process. Where and how to influence the market depends on what type of targets have been selected during the targeting process. The commander’s target list or synch matrix focuses on historically productive events or events deemed to have potential for future success. Commanders must also consider market segments that may be less obvious. Those segments include ethnic markets, legal aliens, leads from other services, and prior service. Commanders must not ignore markets with potential for special missions, such as the Army band, skilled languages, Officer Candidate School, Warrant Officer Flight Training, and Special Forces.

RECRUITING MARKET ENVIRONMENT

3-10. We define our AO and our area of influence (AI) using a map with clearly outlined recruiting market territories and several boundary overlays such as ZIP Codes, counties, states, and recruiting station, company, battalion, and brigade territories. This method gives everyone a common understanding of the recruiting
AO. Identifying other adjoining areas that may have an influence on recruiting operations gives everyone a common understanding of the unit’s AI. The graphic representation of the AO and AI helps the commander and staff visualize and describe the recruiting market.

3-11. USAREC uses the ZIP Code level of a geographic region as the basic building block for all recruiting territories. All station, company, battalion, and brigade geographic boundaries within USAREC are a collection of ZIP Codes. The territory allocation approach provides a unique market intelligence concept of must win/must keep ZIP Codes. Based on successful past performance these ZIP Codes are historically critical to mission success and become the central point of market intelligence activities.

3-12. In an identical market, every recruiter in every region of the country could use the same tools and techniques to motivate people to join the Army. However, not all markets are the same. Markets vary immensely depending on history, culture, economic development, local climate, and many other factors. This variety exists between separate markets as well as within market segments. The internet, cable, and television provide the market with news stories about Soldiers and the Army. Commanders must ensure communication and information provide consistent information to the market. Political and social values have a direct impact on the market’s perception of the Army and can directly affect concurrent operations. Considering the markets’ diversity, USAREC describes the effects of the market by groupings and segments. Commonly USAREC views these segments in terms of mission box categories and general demographic groupings, such as education level, gender, and ethnicity. There are four major ways to view the population:

- **Demographics.** Demographics is the study of population, race, housing (owning versus renting and property value), education, and household information.

- **Psychographics.** A study of the wants, needs, and desires of the market. What types of people live in the unit’s AO and what are their interests? Commanders must understand how the segments influence the total market. They must know segments unique or common to their AO.

- **Lifestyle trends.** Cultural and social values and historical perceptions of military service are all dynamics of the market. One major subsection of psychographics is lifestyle segmentation. USAREC employs sophisticated lifestyle segmentation applications to define recruiting markets. This data describes local markets by such values as hobbies and interests, consumer purchasing trends, music preferences, and popular television shows. This information helps place the recruiter in the right market at the right time with the right message to motivate top quality individuals to join the Army.

- **Economic conditions.** Unemployment and inflation rates, for instance, can affect the motivation of the target audience to join the Army. Poverty rates and household income segmentations help commanders understand their
AO and support MDMP activities during planning operations.

3-13. None of these indicators, by themselves will consistently point out the most productive areas. Taken together, however, with consideration given to past performance, they can clearly identify territories within the AO that bear consideration for recruiting efforts.

**MARKET COMPETITION**

3-14. Competition is any entity within the AO or AI that seeks to employ USAREC’s target market in activities other than service in the Army. Our competition includes the Army National Guard, other military services, colleges and universities, industry, and any other governmental agency and nongovernmental volunteer organizations. To ensure mission success we must develop an understanding of all competition within the AO and AI. Key metrics used in evaluating the competition include HS graduation rates, college attendance and drop-out rates, employment rates, market share ratios with other services, and raw contract production. When evaluating the competition, gather all available information about the competition within the AO and AI. Refer to USAREC TC 5-02, *Intelligence*, on intelligence information methodology and databases.

**RUNNING ESTIMATES**

3-15. Effective plans and successful execution of those plans hinge on accurate and current running estimates. A *running estimate* is the continuous assessment of the current situation and leading indicators of whether the current operation is proceeding according to the commander’s expectations and if planned future operations are supportable. Failure to maintain accurate running estimates may lead to errors or omissions that result in flawed plans or bad decisions during execution. (See Appendix B).

3-16. Running estimates are a component of the MDMP (see USAREC Manual 3-0, *Recruiting Operations* and ADP 5-0, *The Operations Process* and FM 6-0, *Commander and Staff Organization and Operations*, Ch. 8). During the MDMP, the commander uses the entire staff to explore the full range of probable and likely COAs and to analyze the organization’s capabilities. This staff effort has one objective: Provide the commander with accurate, relevant, and actionable market intelligence that affects the planning of recruiting operations.

3-17. Recruiting operations can overwhelm a leader with market data. The IPB provides methodologies to focus information gathering and analyze data. This process is a way to filter through a large amount of information, target beneficial markets, and synchronize limited resources. During the MDMP process, staffs gather information, identify or update running estimates, and validate intelligence. The information derived from this period helps develop and sustain current and future operations.

3-18. Running estimates play an important part while the unit is engaged in continuous operations. A running estimate provides a single document for staff
personnel to reference when answering questions about the current operational environment and the ability to support plans relative to that branch or section of the staff. The running estimate delineates:

- The tasks the section or branch is tracking
- The resources applied to each task
- The measures of effectiveness and performance indicators with current status
- The risks and mitigation strategies

3-19. Making decisions in this type of environment usually takes place after execution has begun. When time is limited or operations are repetitive, use running estimates assists the commander and expedites the process. Although some of the estimates may change significantly, many remain the same or require little change. It is important that the staff maintain their estimates by ensuring they are continually updated and accurate.

**INFORMATION COLLECTION**

3-20. The staff, guided by the commander’s information requirements, continuously collects information according to the collection plan. Every member of the unit has some responsibility for observing and reporting information. Revise the commander’s focus for information collection and revise as often as necessary to keep Soldiers current on information of greatest importance.

3-21. Information collection and dissemination are extremely important. It is equally important to understand that even though the recruiter is a very valuable information collection asset, they are primarily concerned with decisive operations such as prospecting, processing, and Future Soldier management. *Do not over burden recruiters with redundant or unnecessary reporting requirements.* Explore all other possible collectors before increasing the collection and communications requirement on the individual recruiter. Additionally, review your collection plan to make sure the collection effort is still relevant. Identify and eliminate all unnecessary collection requirements.

3-22. Sometimes data volume and running estimate overload can lead to paralysis by analysis. Most information is easy to come by. The challenge is to quickly assimilate the information, then provide intelligence and guidance for current and future operations. Due to the continuous nature of the mission the ability to be flexible and adaptable are key components for running estimates.

**INFORMATION DISTRIBUTION**

3-23. Disseminating information and coordinating COAs involve more than simply telling others about the results of the IPB process. The findings generated by the process feed a number of other functions and documents, as well as targeting, positioning, and mission distribution. Use these findings to synchronize support and assets for high priority operations, improve the information collection plan, and support the MDMP. While IPB serves to organize all the information currently known,
it also identifies intelligence gaps. Collect and process additional data into usable information to fill the gaps and create a better visualization of the market.

3-24. The information derived from each IPB cycle feeds a set of products that support several processes and tools. The processes are the MDMP, targeting, mission distribution, and positioning. The tools are the intelligence collection plan and synchronization matrix. Upon completion of one cycle, the next cycle begins. Feed new information from previous cycles into the current process.

**SUMMARY**

3-25. The IPB and recruiting market intelligence process is complex and extremely interrelated within the intelligence structure as well as with all other staff sections in the brigade and battalion headquarters. It is critical that all staff sections develop an open and collaborative approach on how to conduct operations. A collaborative effort ensures market intelligence is effectively applied.
Chapter 4.
Planning

“Being busy does not always mean real work. The object of all work is production or accomplishment and to either of these ends there must be forethought, system, planning, intelligence, and honest purpose, as well as perspiration. Seeming to do is not doing.”

Thomas A. Edison

4-1. In a continuous operating environment, current information and flexibility is critical. Poor or ineffective communications adversely affect the best-laid plans. Communication must be relevant, clear, concise, timely, and consistent. Visibility at every level of the planned operation is necessary for the synchronization, execution, and optimum use of resources. Commanders must have visibility of all operations planned and executed by a higher level and understand their role within those operations. At all levels, commanders use the operational planning process of MDMP or Troop Leading Procedure (TLP) and issue operation orders IAW ADP 5-0, The Operations Process and FM 6-0, Commander, and Staff Organization and Operations.

4-2. Commanders, with the assistance of their XOs, must set priorities and provide direction and guidance to their staff so that staff members can coordinate and synchronize recruiting lines of effort, activities, and recruiting functions within specified planning horizons. A planning horizon is a point in time commanders use to focus the organization’s planning efforts to shape future events (ADP 5-0). The three planning horizons are long, mid, and short. Planning horizons are normally situation-dependent; however, in recruiting, most planning horizons are time dependent and based on designated periods to include fiscal, MRB AMEDD Board dates, resourcing, recruiting and school calendars as well as influenced by situational events. For example, the Army allocates funding and resources following a Fiscal Year (FY) calendar while recruiting operations follows markets like high schools/colleges and therefore must plan according to school years. Internally, based on recruiting processes and functions, USAREC operates using a Recruiting Processing Calendar (RPC). The RPC incorporates timelines and dates based on processing times, recruiting systems and maintenance downtime, MEPCOM requirements, and recruiting phase lines. These factors, along with planning guidance and decisions by the commander or that of higher headquarters (USAREC and HQ Army) influence the planning horizons (see reference figure 4-1). Commanders and staff must know higher planning horizons that impact subordinate, supporting planning operation processes like targeting, and school recruiting plans (see figure 4-2).
USAREC Operations Planning Process

- Receive recruiting mission 3rd QTR before Fiscal Year (FY) starts
- Planning (MDMP/TLP/OPORD development/issuance) thru mission execution is a 15-18 months process
- USAREC thru Company – issues 5 paragraph OPORD format
- Company = Brigade back brief of recruiting plan to higher HQs for approval during 3rd/4th QTR prior to mission start
- All plans are NESTED – plan supports higher HQ’s intent and end-state objectives
- Assessments: Quarterly-Monthly results

Figure 4-1. Planning Horizons – Operations Planning Process

The commander and Executive Officer (XO) set priorities and provide direction and guidance

**Long-Range Planning (Annual)**
- Develop annual operations plan using OPORD format
- Plans quarterly phases
- Based primarily on dates and time:
  - School calendars
  - Recruiting Processing Calendar
  - Fiscal Year calendar
  - Training calendar
  - AMEDD Boards

**Mid-Range Planning (Semi-Annual-Quarterly)**
- Refinement of annual operations plan
- Accessions Tracking (D3A)
- Working Groups and Boards
- Shaping Operations
- Decisive Operations
- Sustainment Operations
- Quarterly operations updates and QTGs.

**Short-Range Planning (Monthly-Weekly)**
- Targets of Opportunity
- Dynamic Targeting
- Validate 90-day mid-range plan
- Natural disaster contingency
- MAP specific targeting
- Counseling (DA Form 4856s)

The commander and Executive Officer (XO) set priorities and provide direction and guidance

**FRAGORD**
- MAP
- Targeting Board
- Synch Matrix

**OPLAN/OPORD**
- Targeting WG
- Targeting Board
- R2PC
- Synch Matrix
- EMM nomination

- 18 months to 1 year
- Semi-annual to Quarterly
- Monthly to Weekly

*Note: Planning horizons vary based on the situation to include time, events, and anticipated decisions.*

Figure 4-2. Planning horizons - Integration of plans, future operations, and current operations.
PLANNING - THE ARMY DESIGN, OPERATIONAL APPROACH & FRAMEWORK

4-3. The Army uses planning methods throughout the formation for long and short-range planning. At the USAREC level, the CG and staff use the Army design methodology (ADM) to frame the complex problems and solutions, and affect the MDMPs of lower echelons. The ADM provides techniques for framing operational environments, framing problems, developing an operational approach, and reframing. The ADM allows the development of the multi-year and annual USAREC campaign plans, marketing plans, and forecasting inputs. At battalion level and above, commanders employ the operational approach to fully understanding their OE while their staffs perform the MDMP to develop the annual operations plan and publish operational orders that support multi-year and USAREC campaign plans. (See Figure 4-3 and ATP 5.0-1 for more information on the Army Design Methodology)

![Figure 4-3. The Army Design Methodology](image)

4-4. Commanders who use the Army design methodology gain a greater understanding of their operational environment and its problems, and can critically and creatively visualize an appropriate operational approach. With this greater understanding, commanders can provide a clear commander’s intent and concept of operations. Such clarity enables subordinate units and commanders to take initiative. As the operations process unfolds, the commander, staff, subordinates, and other partners continue to learn and collaborate to improve their shared understanding. An improved understanding may lead to modifications to the commander’s operational approach or an entirely new approach altogether (see ATP 5-0.1 for more information on Army design methodology).
4-5. Army leaders are responsible for clearly articulating their concept of operations in time, space, purpose, and resources. This requires commanders to develop a well-written commander’s intent and guidance to facilitate staff planning. They do this through an operational framework and associated vocabulary. An operational framework is a cognitive tool used to assist commanders and staffs in clearly visualizing and describing the application of recruiting assets in terms of time, space, purpose, and resources in the concept of operations (ADP 1-01). An operational framework establishes an area of geographic and operational responsibility for the commander and provides a way to visualize how the commander will employ forces against the enemy. To understand this framework is to understand the relationship between the area of operations and operations in depth. Proper relationships allow for simultaneous operations and massing of effects in order to achieve recruiting goals.

4-6. The operational framework has four components. First, commanders have responsibility for assigned an area of operations. Second, a commander can designate deep, close, and support areas to describe the physical arrangement of assets in time and space. Third, within this area, commanders conduct decisive, shaping, and sustaining operations to articulate the operation in terms of purpose. Finally, commanders designate main and supporting efforts to prioritize resources.

4-7. The concept of operations frames how commanders visualize the actions of subordinate units fitting together to accomplish the mission. The concept of operations expands the commander’s selected COAs and expresses how each element of the force will cooperate to accomplish the mission. Where the commander’s intent focuses on the end state, the concept of operations focuses on the method by which the operation uses and synchronizes the recruiting functions to translate vision and end-state into action. Commanders must ensure the concept of operations is consistent with both their intent and that of the next two higher commanders.

POSITIONING

4-8. Commanders and their staffs set and adjust the recruiting force based on the recruiting market in their assigned area of operations. All levels of the command are involved in the process of determining recruiting force placement. The staff accomplishes this task through the Position Analysis and Evaluation (PAE) methodology (also see USAREC Reg 601-73, Market Analysis to Support Recruiting Operations and USAREC TC 5-02, Intelligence).

4-9. The PAE methodology is a systematic process for conducting a comprehensive market analysis. It incorporates the local knowledge and experience of the station and company leaders, and leads to decisions on recruiting station market boundaries, recruiter allocation, and facility location. The goal of positioning is to maximize the number of enlistments and commissions by placing recruiters where they have the maximum opportunity to enlist or commission Future Soldiers while balancing where the market lives and where they are most willing to join a military service. The process requires participation of the entire brigade and battalion staff because it results in many administrative and resourcing actions.
MISSION DISTRIBUTION

4-10. USAREC receives the accession mission from the Department of the Army. Recruiting markets are not equal and units vary in size. It is typical for some battalions to carry larger missions than others. Unlike typical infantry battalions that are like-sized, recruiting battalions come in varied sizes depending on the demographics of the market. The USAREC CG is the approval authority for missions to each brigade; the USAREC G2 converts Department of the Army’s accessions requirements into operational recruiting missions; the USAREC G3 publishes the missions by means of plans and orders and conducts operations; Health Services Directorate (HSD) monitors execution of AMEDD and chaplain recruiting missions. (Also see UR 601-73, Market Analysis to Support Recruiting Operations for missioning procedures).

COURSE OF ACTION (COA) DEVELOPMENT

4-11. The USAREC G2 develops brigade missions with recommendations for the battalion level missions. There is 10% or less authorized deviation to the battalion level missions, unless justification to exceed 10% is submitted IAW USAREC Regulation 601-73. The S2 is responsible for integrating the commander’s guidance during the development of multiple COAs for issuing recruiting missions to the appropriate level based on market assessment and on-the-ground considerations. The other staff sections provide critical input (personnel fills, station activations, closures, and targeting board initiatives) to the process.

4-12. The commander’s direct involvement is essential for the timely analysis of market intelligence and mission analysis. Commanders should review all available assets, identify critical facts and assumptions, and evaluate any risks. The commander’s vision and guidance establishes the initial vision for the operation and provides guidance to the staff for developing specific COAs.

4-13. The brigade’s and battalion’s IPB, as discussed in Chapter 3, is a continuous intelligence process, which is vital to a battalion’s operational success. Decision-making is a demanding and multidimensional process where commanders analyze intelligence to determine the best COA. Using data from like periods allows commanders to make timely and sound operational decisions (see MDMP fig 4-2).

- Development. COA development considers subordinate companies’ plans and the commander’s intent. The result is a COA statement that clearly states the refined battalion commander’s intent.
- Analysis. Evaluate subordinate companies’ plans to ensure all operations conform to recruiting doctrine, USAREC standards, and the commander’s guidance.
- Comparison. Compare subordinate companies’ plans to the battalion’s to ensure the plan takes advantage of all assets and markets.
Approval. Brigade and battalion commanders review and if necessary modify their plan to meet their intent. Commanders also give guidance to the staff regarding the priority of sustainment assets.

Figure 4-4. Military decision making process (MDMP)

ADAPTING TO CHANGING CIRCUMSTANCES – BRANCHES AND SEQUELS

4-14. Given the uncertain nature and the dynamics of the recruiting environment, the objective of planning is developing a framework for action in the midst of such uncertainty. Planning involves thinking about ways to influence the future, as well as how to respond to potential threats to the mission or opportunities for success. Put simply, planning is thinking critically and creatively about what to do and how to do it, while anticipating changes along the way. By anticipating events beforehand, planning helps the recruiting force seize, retain, or exploit the initiative. Follow-on planning entails identifying and evaluating potential decisions and actions in advance to include thinking through consequences of certain actions. Identifying decision
points and developing branch plans and sequels associated with those decision points is key to effective planning. For example, after execution of a shaping operation such as a Total Army Involvement in Recruiting (TAIR) event or an Educator Tour, execute a decisive operation to capitalize on key and influential people who offer resources. Follow-up by a subordinate commander or recruiter is always appropriate as a follow-on mission.

THE ANNUAL OPERATIONS ORDER (OPORD) DEVELOPMENT PROCESS

4-15. The annual OPORD is the commander’s tactical plan for the recruiting calendar year. Building the OPORD (see appendix A - OPORD Annex information) requires a systematic planning approach used to maximize recruiting efforts to achieve mission success. The brigade and battalion’s annual operation plan focuses on shaping and sustaining operational strategies for the mission year and beyond. The OPORD is the final product of the MDMP and staffing processes that includes the SWOT (strengths, weaknesses, opportunities, and threats) and recruiting functions analysis (RFA). (Refer to USAREC Manual 3-0, chapter 3, for the command process on operation plan development (USAREC through Battalion) and USAREC Manual 3-30 (Company Operations) for components of the company OPORD).

4-16. The S3 is responsible for the overall draft of the battalion OPORD under the supervision of the XO or DCO, with input and assigned areas that belong to each of the staff sections in the battalion. Each staff section is responsible for reviewing corresponding sections of the subordinate unit’s OPORD, and recommending approval or revision. Each staff section also is responsible for running estimates (see Appendix B) and the fusion process (analysis of results) in support of the OPORD.

4-17. The OPORD reflects the lower echelons of command and uses the eight elements of the recruiting functions as its tactical road map. The battalion’s plan, even though market driven, nests in the brigade’s plan. Likewise, the company and station plans nest within the next higher echelon. Brigade and battalion commanders apply bottom-up refinement in analysis, targeting, and synchronizing requested events during the planning and review process. The OPORD at company through brigade should cover the appropriate quarter and beyond the mission period, specifically the current phase line, recruiting contract quarter, and fiscal year.

4-18. Development of the OPORD begins with the IPB. The information gathered during IPB will verify the lower echelon OPORDs and ensure prospecting activities are in high payoff zones and events in the phase line and recruiting contract quarter. Directing prospecting efforts to high payoff areas maximizes valuable recruiting time and increases enlistment efficiency. Each unit’s market is different and a “one size fits all” prospecting directive from battalion or brigade can stifle even the best recruiter’s efforts and negatively affect their operating plan and ultimately the mission.

4-19. At battalion level, after evaluating the market, the commander should review the company lead generation and prospecting plans, and school plans. Commanders should ensure companies use their IPB, and lead prospecting analysis, when formulating their plans. They must also verify simultaneous market penetration, and compliance with the commander’s intent.
4-20. Battalion Commanders must ensure their companies’ OPORDs have enough flexibility written in to easily accommodate processing activities. Do not compromise the lead generation and prospecting plan to accommodate processing. The only reason to revise a lead generation and prospecting plan should be to redirect prospecting efforts, not steal time for processing.

4-21. The company OPORD should include all funded and unfunded events and be scheduled on the synchronization matrix (see fig 4-8). Scheduled events in the OPORD should include all requested sustainment activities such as Total Army Involvement in Recruiting (TAIR), battalion assets, or community partner (CP) events. Events should be annotated on the battalion’s synch matrix and discussed at the targeting board meeting.

4-22. After evaluation and adjustment (if necessary) of the battalion or company plan the commander finalizes the OPORD and publishes it. The OPORD is a living document, periodically adjusted to accommodate market changes, command directives, after- action review (AAR) results, etc. Adjustments are made IAW the operational processes such as issuing a FRAGORD (fragmentary order) (See Army FM 6-0, Commander and Staff Organization and Operations).

THE TARGET PROCESS

4-23. Targeting is the process of selecting and prioritizing targets and matching the appropriate response to them. Targeting requires consideration of operational requirements and internal and external capabilities. Targeting is continuously refined and adjusted between the commander and staff as the recruiting operation unfolds. A Target is an entity or object considered for possible engagement or other action. Today’s complex operational environment requires the integration of a myriad of influencing assets. The targeting process weighs the benefits and the cost of influencing various targets or markets in order to determine which targets, if engaged, are most likely to contribute to achieving the desired end state. Adhering to four targeting principles should increase the probability of creating desired effects and influencing targeted markets. These principles are—

- The targeting process focuses on achieving the commander’s objectives. It is the function of targeting to achieve efficiently those objectives within the parameters set at the USAREC, brigade, and battalion, levels. Every target nominated must contribute to attaining the commander’s objectives and ultimately impacts recruiting markets by increasing recruiting lead and prospect generation.

- Targeting is concerned with the creation of specific desired effects through information and influencing actions. Target analysis considers all possible means to achieve desired effects, drawing from all available capabilities. The art of targeting seeks to achieve desired effects with the least risk and expenditure of time and resources.
Targeting is a command function that requires the participation of many disciplines. This entails participation from all elements of the unit staff, special staff, special augmentees, other agencies, organizations, and community partners. Many of the participants may directly aid the targeting effort while working at locations vast distances from the unit. Company and station level elements frequently have access to 'bottom up' intelligence and must play an active role in the targeting process.

A targeting methodology is a rational and iterative process that methodically analyzes, prioritizes, and assigns assets against targets systematically to achieve those effects that will contribute to achieving the commander’s objectives. If the desired effects are not achieved, the AAR process should determine why, and if the target(s) are recycled through the process for reconsideration.

4-24. Targeting is a task that supports decisive, shaping, and sustaining lines of efforts that encompasses many disciplines and requires participation from staff elements and external agencies (i.e. USAMEB, TRADOC, and the Office of the Chief Army Enterprise Marketing (OCEAM)). The purpose of targeting is to integrate and synchronize resources into one unified operation.

4-25. USAREC targets using the Army’s targeting methodology of decide, detect, deliver, and assess (D3A). Targeting can be deliberate (planned targets) or dynamic (targets of opportunity and changes to planned targets or objectives). Commanders may opt to apply other targeting methodologies—Find, Fix, Track, Target, Engage, and Assess (F2T2EA) or Find, Fix, Finish, Exploit, Analyze and Disseminate (F3EAD)—as appropriate. Both of these models are consistent with the D3A methodology. (See ATP 3-60)

4-26. The D3A methodology is an integral part of the military decision making process MDMP from receipt of the mission through operation order (OPORD) execution and assessment. Like MDMP, targeting is a leadership driven process. Targeting frequently begins simultaneously with receipt of mission, and may even begin based on a warning order. As the MDMP process continues, targeting focuses based on the commander’s guidance and intent. D3A methodology functions occur simultaneously and sequentially during the operations process. Decide and detect functions coincides with the MDMP from the mission analysis through the issuing of the approved plan or order. The detect function starts with the commanders approval of the plan or order and is accomplished during execution of the plan or order. Targeting activities begin once a target is acquired, executed and assessments made. The targeting working group is the proponent for focusing the targeting process during specified times (See Figure 4-5).
4-27. There are two distinct functions the targeting process supports - event targeting and geographic targeting. Event targeting prioritizes the use of local and national assets through identification of high payoff and value events with an anticipated generation of the highest number of quality leads. In this instance, the number of leads are the return on investment (ROI) or assessment. The targeting process also identifies markets by geographic areas, stations, companies, or battalions expected to generate the highest number of quality contracts, i.e., ROI. This process identifies the need for higher recruiter fill rates or additional staffing and funding.

4-28. Event targeting considers community events, educational events, high schools, postsecondary schools, and industry events in terms of the potential and propensity of the population segments most likely to attend. This determines the types of resources used for an event. One of the resources is “targeted marketing.” “Targeted marketing” provides the maximum number of qualified leads for recruiters, using multiple simultaneous events and application of recruiting assets. Targeted marketing requires commanders to use their skills as a planner and director of assets and resources. The event targeting process uses and updates the synch matrix.

4-29. Geographic targeting helps commanders decide the best applications of the more persistent assets such as recruiter placement and advertising assets, as well as other resource allocations. The USAREC targeting model is the starting point for the geographic based targeting effort. The must keep/must win methodology can also help the commander decide where to allocate limited resources. IPB products round...
out the tool set for the geographic based targeting process.

**TARGETING WORKING GROUP**

4-30. The targeting board’s objective is to provide and synchronize recruiter support and advertising to leverage decisive and shaping operations. The board reviews the battalion’s synch matrix then develops a plan to provide the requested support within prioritized markets. At the battalion level, targeting board membership must include, but is not limited to, the commander, XO, S1, S2, S3 (RA and AR operations officers or NCOs), S4, ESS, A&PA, Virtual Recruiting Station (VRS) commanders and company commanders. The same concept is equally applicable at brigade level where membership widens to include the S8. This diverse membership evaluates all available intelligence from the lowest level to the headquarters and develops a draft target list and targeting plan.

4-31. All targeting plans must comply with HQ USAREC’s targeting guidance. The plan should synchronize resources to effectively attack markets with a high propensity for enlistment, and counter sister service pressure in designated market areas of interest (MAIs). The targeting plan should focus the recruiting effort to MAIs and maximize the employment of available resources.

4-32. The targeting plan includes IPB products and the rationale for use of different assets to penetrate the market as well as a quantifiable expected result in terms of leads and contracts. Most importantly, the plan fixes responsibility at the appropriate level.

4-33. Prior to the targeting working group meeting, the S2 develops and recommends prioritization of effort to the commander. The commander must designate the targeting priorities, the degree of effort, and required support. The A&PA chief will prepare and distribute a draft advertising plan based on the commander’s priority of effort prior to the targeting working group meeting. The plan should include the digital social media strategy that supports local marketing campaigns as well as Army Brand campaigns. The plan will include input from the battalion’s Virtual Recruiting Station and information distributed by the USAREC Digital Engagement Fusion Team (DEFT). The S2 considers the strength of priority units, vacancy posture, and the priorities of supported regional readiness commands and major subordinate commands. The ESS reviews school status and nominates high schools and postsecondary schools for targeting. The ESS nominations must support the commander’s objective for the MAIs. Battalions should target stations using input from their company commanders. Company commanders should nominate targets in accordance with the battalion commander’s guidance, targeting priorities, and stated objectives. These nominations should also recommend suitable recruiting assets and quantifiable objectives. Company commanders should consider all resources to include battalion trainers, TAIR, CPs, VIPs, FSTP, ADOS-RC, brigade assets (foreign language advocate, band liaison), as well as US Army Marketing and Engagement Brigade (USAMEB) assets. During the targeting board meeting, the company commander should be prepared to discuss the lessons learned from previous operations (see fig 4-6).
4-34. The targeting working group must ensure all resources are in place to support both the main recruiting efforts and supporting activities. Commanders must understand the employment and distribution of assets is not on a fair share basis. Some activities may require multiple assets to achieve the desired objective. When determining what assets to employ, the targeting board should consider a variety of assets regardless of perceived availability.

4-35. The targeting working group establishes measurable metrics for events IAW the commander’s guidance and intent. These metrics then become part of the required analysis (fusion process) of the events. The purpose of setting these metrics is primarily for establishing an ROI (return on investment). Staff elements track the metrics as part of their normal running estimates. The targeting board sets timeline requirements on each event and reviews the benchmarks against results. These metrics should include shaping operations prior to the event and the decisive operation (the conduct of the event). The board sets timeline reviews that normally occur monthly and quarterly, followed by recommendations of the board to the commander. Company commanders and station commanders should hold similar meetings at their levels. It is critical that all levels of command understand their commander’s intent and give direction and focus to members of their units.

4-36. Staff elements play a key role in target planning and synchronization by ensuring the market segments and embedded analysis are valid. Staffs validate the
subordinate unit’s analysis process and selection of events (fairs, demonstrations, career nights) that align with the targeted markets using the synchronization matrix (see fig 4-7). Commanders synchronize the available marketing and recruiting functions in a refined and efficient manner to provide maximum support and relevance to the recruiter’s efforts. Finally, they ensure their subordinate commanders conduct regular AARs.

4-37. The synch matrix lists all the events both inside and outside the AO. The S2 then provides analysis and input, based on the IPB and MDMP, to identify which asset to use at which event to get the greatest return on investment (ROI).

<table>
<thead>
<tr>
<th>Battalion Sync Matrix</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Date</td>
</tr>
<tr>
<td>7/24</td>
</tr>
<tr>
<td>7/24</td>
</tr>
<tr>
<td>7/30</td>
</tr>
<tr>
<td>7/30</td>
</tr>
<tr>
<td>8/10</td>
</tr>
</tbody>
</table>

Figure 4-7. Example Synchronization Matrix

**TARGETING BOARD**

4-38. The targeting board is a formal meeting to receive the commander’s decision on the recommendations of the targeting working group. The targeting board follows the same agenda as the targeting working group but chaired by the commander, or his designated representative. The targeting board usually includes XO/DCO, S2, S3 (RA and AR operations officers or NCOs), ESS, A&PA, and the VRS. Subordinate unit targeting boards should nest themselves with the higher headquarters targeting cycle. Upon completion of the targeting board, the S3 disseminates the approved targeting results and products to the subordinate units. The targeting products include:

- The approved High Pay-off Target List/Target List, and target selection standards. Additionally, data from the IPB can contribute to a unit’s specific targeting synchronization matrix.

- Tasks to subordinate units and assets. The S-3 should prepare and issue a fragmentary order to subordinate elements to execute the targeting plan and assessment of targets developed by the targeting working group and targeting board.
4-39. Targeting is continuous and cyclical. The staff obtains the commander’s approval and then prepares fragmentary orders with new tasks to subordinate units as needed. (See Figure 4-8 for USAREC Targeting Planning Cycle)

<table>
<thead>
<tr>
<th>TRADOC FUSION BOARD</th>
<th>USAREC TARGETING BOARD</th>
<th>USAREC FUSION CELL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First month of quarter</strong></td>
<td><strong>Second month of quarter</strong></td>
<td><strong>Weekly</strong></td>
</tr>
<tr>
<td>Q1 Review events/resources Q1</td>
<td>Assess events last QTR</td>
<td>Coordinate/synch resources Q2-Q4</td>
</tr>
<tr>
<td>Lock events/resources Q2</td>
<td>Approve Q4 major events</td>
<td>Q2 – final coordination</td>
</tr>
<tr>
<td>Develop events/resources Q3</td>
<td>Refine Q2, Q3 major events</td>
<td>Q3 – mid-term coordination</td>
</tr>
<tr>
<td>Q2 Review Q2</td>
<td>Assess last QTR</td>
<td>Q4 – long-term coordination</td>
</tr>
<tr>
<td>Lock Q3</td>
<td>Approve Q1</td>
<td></td>
</tr>
<tr>
<td>Develop Q4</td>
<td>Refine Q3, Q4</td>
<td></td>
</tr>
<tr>
<td>Q3 Review Q3</td>
<td>Assess last QTR</td>
<td></td>
</tr>
<tr>
<td>Lock Q4</td>
<td>Approve Q2</td>
<td></td>
</tr>
<tr>
<td>Develop Q1</td>
<td>Refine Q4, Q1</td>
<td></td>
</tr>
<tr>
<td>Q4 Review Q4</td>
<td>Assess last QTR</td>
<td></td>
</tr>
<tr>
<td>Lock Q1</td>
<td>Approve Q3</td>
<td></td>
</tr>
<tr>
<td>Develop Q2</td>
<td>Refine Q1, Q2</td>
<td></td>
</tr>
</tbody>
</table>

Q1 = 1st Quarter (Oct-Dec)  Q2 = 2nd Quarter (Jan-Mar)  Q3 = 3rd Quarter (Apr-Jun)  Q4 = 4th Quarter (Jul-Sep)

**FUSION CELL**

4-40. Fusion cells also play a key role throughout the D3A process by continuously monitoring and managing the commander’s approved targeting plan.

4-41. Fusion cell composition. At brigade and battalion levels, fusion cells, under the supervision of the XO, include representatives from the S2, S3, ESS, A&PA chief and other staff elements as required.

4-42. Key tasks include:

- Continuously assess the environment and operations in support of the commander’s approved targeting plan
- Ensure identification of all assets and resources, availability, and proper employment to support the commander’s intent
- Monitor bottom-up implementation, refinement, and reporting
- Provide timely fusion of information and plans to maintain a common operational picture across the staff and between echelons of command
- Support accurate analysis of the effects of the targeting plan
- Review and analyze data to identify any challenges and opportunities that could affect the allocation of assets and resources
- Monitor on-going actions to ensure events and advertising support the targeting plan down to the lowest level
- Ensure resources align with the supporting commander’s targeting plan
**BATTLE RHYTHM**

4-43. Battle rhythm describes the events a unit conducts on a recurring basis that is necessary for mission success. Many factors help determine and establish a unit’s battle rhythm. Some of these factors are the unit’s state of training, the battle rhythm of higher headquarters, and the current mission. Headquarters, USAREC influences battle rhythm. Units develop a battle rhythm by considering the priority and importance of recruiting operations that must take place to achieve the mission.

4-44. Battle rhythm is an important part of mission command; determined by the USAREC recruiting calendar and the annual operation plan. The calendar determines the available mission days for each month and the operation plan determines the recruiting force’s daily, weekly, monthly, and quarterly operational requirements to achieve the mission. The targeting and tempo of recruiting operations may fluctuate, but battle rhythms rarely change after being established.

4-45. Recruiting functions support battle rhythm. Activities such as lead generation and directed prospecting can occupy most of a recruiter’s time. Prospecting plans, while critically important, must be flexible. Flexibility allows recruiters to process applicants but exploit markets of opportunity when opportunities present themselves.

4-46. The operational tempo of a station is upset when a high school refuses to release a student list to recruiters. The commander must immediately address the situation and redirect the recruiter’s efforts. Maintaining an operational tempo requires seamless nonstop dialogue up and down the chain as well as side to side. Commanders must synchronize the unit’s operational tempo with the battle rhythm.
Chapter 5.
Decisive Operations

“One thing is sure. We have to do something. We have to do the best we know how at the moment. If it doesn’t turn out right, we can modify it as we go along.”

Franklin Delano Roosevelt

5-1. The decisive operations are those activities that directly accomplish the mission (ADP 3-0). In recruiting operations, decisive operations locate targeted prospects, engender a commitment through the Army interview, process the applicant, and then prepare them for Army service. For in-service recruiting operations, decisive operations locate targeted prospects; engender a commitment to one of the in-service options through briefings, counseling, and mentorship.

5-2. At the operational level, commanders ensure successful decisive operations by providing the force with all necessary guidance, resources, and training. Successful decisive operations are the result of continuous planning, training, and resources. At the tactical level, station and company decisive recruiting operations engage the market along three primary lines of effort for close-in operations: prospecting, processing, and leading Future Soldiers.

PROSPECTING

5-3. Prospecting is the foundation for all recruiting operations. Recruiters use the function of prospecting to locate and contact qualified men and women. All other decisive, shaping, and sustaining operations, even though they enable the recruiting process and supply leads, are secondary to prospecting. Whether conducted by telephone, face-to-face, or on the Web, prospecting is critical to mission success. Since prospecting is so vital to mission success, it is imperative for leaders to provide prospecting guidance, monitor execution, and conduct continual assessments in order to make adjustments. It is essential that all recruiters receive periodic training to sharpen their prospecting and interviewing techniques. All leads and referrals, regardless of how obtained, must be contacted by a recruiter. It is imperative that recruiters make a good first impression. Continuous training and assessment in this area will give the battalion the best return for time and funds invested.

5-4. The command has established prospecting standards. Recruiters who regularly meet the command’s standards have a high probability of mission success. Prospecting, however, even when performed to standard, may not always result in the anticipated number of appointments made. There is no way to predict the daily outcome of prospecting activities. Continuous prospecting activity in all markets, using all prospecting methods, equals success.

5-5. Recruiters who perform prospecting activities to standard but miss the appointment made requirement can experience frustration and apathy. Commanders who counter missed requirements with inflated, unattainable standards only add to
their subordinate leader’s and recruiter’s frustration. Commanders should always be aware of their force’s morale and counter negativity with a winning attitude to both inspire and motivate. Refer to USAREC TC 5-03.1, Prospecting, Processing, and Analysis for the fundamental concepts and requirements of prospecting.

**PROCESSING**

5-6. Processing applicants for enlistment or commission is a labor-intensive operation. Applicants must prove citizenship and be mentally, physically, and morally qualified for enlistment or commission. Any additional time used to process applicants can negatively affect a recruiter’s time management. Monitoring the entire enlistment or commissioning process determines any training issues, choke-points, or system weaknesses. Sufficient training resources improve and streamline processing operations.

**LEADING FUTURE SOLDIERS**

5-7. Future Soldier leadership is the entire command’s duty and responsibility from recruiter to battalion commander. Every effort to train, motivate, and inspire Future Soldiers is necessary. Recruiter interactions with the Future Soldier occur while the Future Soldier is enrolled in the Future Soldier Training Program (FTSP). Continuous interaction between the recruiter and Future Soldier builds camaraderie and trust. It also creates the opportunity to reinforce the Future Soldier’s decision to join the Army, react to any unforeseen circumstances, and calm any fears they may have regarding training or assignment.

5-8. Commanders must communicate regularly with their subordinate commanders regarding the status of their FSTPs. The discussions should be based on real-time data and address any known or perceived problems that could affect the near-term or long-range accession mission. Consider seasonal FSTP loss trends and current world events when formulating plans to reduce and replace any pending or predicted losses. Refer to USAREC TC 5-03.5, Leading Future Soldiers for details on leading Future Soldiers and FSTP management.

**SUMMARY**

5-9. Decisive operations are the key to recruiting success and require thoughtful planning. In recruiting, decisive operations conducted along three lines of effort (prospecting, processing, and leading Future Soldiers) locate targeted prospects, engender a commitment through the Army interview, process the applicant, and then prepare them for Army service. Brigade and battalion commanders and staff efforts must focus on supporting and enabling successful decisive operations.
Chapter 6.

Shaping Operations

Shaping operations prepare the way for decisive operations. They are as limitless as the commander’s vision and imagination. Commanders saturate the AO with high visibility shaping operations to soften targets and gain the competitive advantage for successful decisive operations.

INFORM AND INFLUENCE AUDIENCES – INSIDE/OUTSIDE THEIR ORGANIZATION

6-1. An overarching aspect of shaping operations within USAREC is the ability of a commander to inform and influence audiences both inside and outside their organization. Commanders ensure actions, themes, and messages complement and reinforce each other to accomplish objectives. An information theme is a unifying or dominant idea or image that expresses the purposes for an action. A message is a verbal, written, or electronic communication that supports an information theme focused on an audience. It supports a specific action or objective.

6-2. Commanders ensure actions, themes, and messages complement and reinforce each other and support operational objectives. Every action implies a message that requires vetting to ensure it supports the commander’s intent. Some commanders inform and influence through recruiter and leader engagements, conducting radio programs, local and national advertising, command information programs, operations briefs, and unit VRS website posts. The staff assists the commander in creating shared understanding and purpose both inside and outside their organizations and among all affected audiences. This supports the commander’s operational goals by synchronizing words and actions. (See FM 3-13, Information Operations, for further doctrine on information operations)

LEAD GENERATION

6-3. Lead generation is a shaping operation. Various types of leads are provided by HQ USAREC via the Army Recruiting Information Support System (Top of the System), as well as, recruiter-generated school lists, ASVAB results, TAIR events, and various other means. Computer-generated lead lists offer recruiters refined lists of eligible individuals. Local school lists in many cases have to be refined, reformatted, and in some cases, constructed using resources such as yearbooks or name lists acquired from class ring or yearbook vendors. The manual construction and refinement of school lists can occupy much of a recruiter’s time. The combined efforts of recruiter, company, and ESS may be necessary to encourage principals, superintendents, or school boards to release student lists. A continuous supply of quality leads gives recruiters a competitive advantage by allowing more time for prospecting and processing.
SCHOOL RECRUITING PROGRAM

6-4. The School Recruiting Program (SRP) is the recruiter’s gateway to the community and target market. A properly developed and maintained SRP leads to successful senior, graduate, and high graduate prospecting operations. A good school program helps recruiters establish credibility and allows them access to important community and student influencers. School programs support the concept of simultaneous market penetration by providing senior and graduate leads that support immediate and future recruiting missions. A foothold in the senior market is necessary, even when the primary recruiting mission is for graduates. (Refer to Appendix C for example of Shaping Operations at battalion level).

6-5. The ESS works within the school environment to educate and influence educators regarding Army opportunities. Working as a partner with the school will allow recruiters greater freedom of movement within the school community. This partnership ensures recruiters have good visibility in the school and are talking to the right people. Command policy for ESSs and school support resources must be flexible and adaptable to the ever-changing recruiting environment.

COMMUNITY PARTNERS (CP) AND VIP DEVELOPMENT

6-6. The CP and very important person (VIP) network is comprised of informed allies who support and promote Army opportunities and have influence with students, graduates, and key influential figures. All levels from recruiter to battalion commander should have an established network of influencers. These CPs and VIPs not only influence potential Future Soldiers and Future Officers; they also influence community, state, and national leaders. A properly developed network can produce favorable Army exposure and influence the target market. Commanders should promote and personally develop CPs and VIPs throughout their AO.

6-7. Educator/CP tours afford educators and key influencers an opportunity to observe training and experience Army life firsthand. The tour’s main objective is to educate and dispel any preconceived ideas or notions influencers may have about the Army and develop new CPs. The goal of the tour is to team pro-Army influencers with neutrals in hopes of building professional relationships and alliances. The majority of tour participants should come from schools that have market potential but produce very few enlistments.

A&PA

6-8. Advertising at the local level consists of print, radio, cinema, and out of home such as billboard ads. A&PA offices and contracted advertising agencies are responsible for negotiating and triple bidding proposals.

6-9. Advertising is the command’s most costly and far-reaching shaping operation. Resources are limited and synchronization between command levels, national asset utilization, and the national advertising strategy is essential to maximize the ROI. Market intelligence must be very specific and address all annual events and cultural issues that occur in the battalion’s AO.
6-10. Marketing communications councils and targeting board meetings convene quarterly and establish subsequent advertising plans. The meeting focuses on the synchronization of markets of opportunity, events, and advertising support.

6-11. Public affairs promotes Army awareness and shapes public opinion through targeted communications that tell the Army story through command information, community relations, and media relations. Commanders must understand the importance of public affairs and maximize its use.

- Command information is delivering messages to members of internal audiences through various means such as SPAN sites, newsletters, e-mail, and intranet.
- Community relations are the interrelationships between military and civilian communities through programs such as CP, Partnership for Youth Success (PaYS), TAIR, and guest speakers.
- Media relations are the interaction between the military and local news media. The A&PA staff must continually employ public affairs programs that promote the commander’s vision and inform the public of the benefits of RA and AR service.

**TRAINING FOR MEDIA AWARENESS**

6-12. Some recruiting areas, for example, New York City and Washington, D.C., are hotbeds for news media interview requests. Brigades and battalions in other areas, however, must spend more effort on planning, setting up, and conducting news media interviews. The A&PA staff must be continually engaged in developing plans to seek out news media opportunities, promote the commander’s vision, and inform the American public of the benefits of RA and AR service.

6-13. The objective when interacting with the media is to ensure that the Army is represented in the proper context while educating the American public on what the RA and AR offers to those who answer the call to duty. Every member of the recruiting team should receive training on how to plan for and conduct a media interview.

6-14. Members of USAREC from commanders down to field recruiters should participate in news media interviews at every opportunity. It is an opportunity to provide the media with accurate, timely, and useful information about the Army. Commanders must work closely with their APA when preparing to conduct news media interviews.

6-15. Units should train for media awareness in two parts: First through a classroom presentation and then through practice exercises.

- Classroom phase. A&PAs should present a class on how to prepare for and how to conduct a media interview. The training should include an explanation of why command members should conduct interviews and discuss commonly asked interview topics. The training prepares members of the command to convey the Army’s messages so that the public understands what the Army offers the Nation and its youth.
• Field phase. Soldiers should be encouraged to accept media interview requests at every opportunity and involve A&PA in all engagements.

**SUMMARY**

6-16. Successful decisive operations are dependent on well-planned and executed shaping operations. Shaping operations help recruiters optimize their time, effort, and resources by preparing the market for recruiting activities. Recruiting operations are intense and fast-paced. Changes due to command decisions or market trends can and do happen at a moment’s notice. Even though shaping operations support specific decisive operations, they must remain flexible. Mission success is the result of the recruiter and leader’s ability to redirect shaping operations into decisive activities that take advantage of available opportunities quickly and efficiently.
Chapter 7.
Sustaining Operations

“The secret of all victory lies in the organization of the non-obvious.”

Marcus Aurelius

7-1. Sustaining operations generate and maintain recruiting power. Sustaining operations enable shaping and decisive operations by providing sustainment activities. Sustainment provides and maintains the necessary levels of personnel, training, and material to sustain decisive and shaping operations throughout their duration.

FUNDAMENTALS OF SUSTAINING OPERATIONS

7-2. The nature of the recruiting mission requires continuous execution of recruiting operations. The operational tempo of recruiting can place excessive demands on the support system and recruiter alike. Sustaining operations are vital to successful recruiting operations and the well-being of the recruiting force.

SUSTAINMENT

7-3. The commander and staff must critically review mission and command requirements to determine the effectiveness of the command’s sustaining operations. Mission success is accomplished through decisive recruiting operations; however, the success of those operations is determined by the quantity and quality of logistic and personnel support. The commander should develop sustainment operations concurrent with all other operational planning. Informed and detailed planning will ensure a smooth, continuous flow of material and services to the field.

7-4. Staff assessments (running estimates) of sustaining operations should address planning, implementation, and responsibilities in detail. Simplify every effort and standardize as many sustainment operations as possible. Lengthy planning sessions should be discouraged in favor of brief informed discussions.

7-5. Commanders should periodically monitor the staff sections to ensure support actions take place within desired timelines. Asking questions and receiving periodic updates helps the commander motivate the staff and maintain operational momentum. Commanders may also consider a weekly meeting with key staff to receive a mission status report and provide direction, if necessary.

7-6. It is important to schedule staff meetings at the same time of day and on the same day of the week. Routinely held meetings allow the staff sufficient time to plan and prepare their data. Meeting routinely at the beginning of the week allows commanders and staff time to adjust or redirect operations.
LOGISTICS AND SUPPLIES

7-7. All recruiting operations are dependent on the timely acquisition and disbursement of supplies and equipment. The supply section issues and/or maintains recruiting tools such as, laptops, cell phones, and vehicles. They also have oversight for all recruiting facilities as well as the procurement of goods and services using government purchase cards or contracts. Problems with any of these key recruiting tools or administrative supplies can negatively affect operations and ultimately the mission. Logistical personnel must understand how their actions affect recruiting operations and mission accomplishment. Commanders should periodically review key operational equipment.

PERSONNEL MANAGEMENT

7-8. Personnel management is always on the commander’s scope and is an important operational consideration. Properly executed Human Resources Support can help sustain the recruiting force and positively affect operations. Support personnel should have an understanding of the recruiting mission and be aware of their role in both tactical and strategic operations. Administrative requirements should not supersede recruiters’ tactical and operational activities.

7-9. Distractions like pay and personnel issues can affect recruiters’ performance. Many times Soldier issues directly affect Family members who reside in the recruiting environment away from the support of an Army post. Commanders should be proactive in the care and welfare of their Soldiers and families. S1 is a direct feed to command climate. It is not only marketing or prospecting efforts that stand in the way of victory; oftentimes, success lies in how Soldiers perceive staff support and treatment.

SOLDIER AND FAMILY ASSISTANCE PROGRAM

7-10. Soldier and Family Assistance Program (SFAP) information and intelligence is an essential component of the planning process and aides commanders when making decisions. Soldier and Family support issues can affect unit performance. Solid Family support allows recruiters to actively engage in operational activities. Even basic motivational leadership can be challenging in a continuous operating environment. The staff should keep commanders current on all matters pertaining to Soldiers and Families. Most recruiting Families live in civilian communities, so there is always the potential for media involvement. The SFAP coordinator (SPAPC) acts as the liaison between the commander, the community, and family support programs.

7-11. Functions of the SFAP are to implement the Total Army Family Program that seeks to improve the health, welfare, and morale of Soldiers, civilian employees, and Family members. SFAP coordinates medical care for recruiters and families to include TRICARE, Delta Dental, and direct care for active duty Soldiers serving away from military medical treatment facilities. The program coordinator coordinates ACS-type support, which includes:

- Relocation assistance.
• Exceptional Family Member Program (EFMP).
• Army Emergency Relief (AER).
• Consumer Affairs and Financial Assistance Program.
• Information, Referral, and Follow-up Program.
• Family Advocacy Program (FAP).
• TRICARE Beneficiary Counseling Assistance
• Army Volunteer Program

TRAINING

7-12. The three domains of training—operational, institutional, and self-development—increases unit readiness. USAREC units experience a complex and changing operational environment requiring all leaders and recruiters to master the fundamentals of recruiting while maintaining Soldier and leader task proficiency. USAREC employs the same Army concepts of training and leader development established in ADP 7-0, FM 7-0, AR 350-1, Training and Leader Development, USAREC Reg 350-1, and USAREC Training Circular 5-03.4. Commanders should strive for training that is innovative, relevant, timely, and yet doctrinally and technically sound. S3s must ensure to outline all training functions into the unit’s training guidance and plans (see USAREC Regulation 350-1). Commanders publish training philosophy for near-term, short-range, and long-range training and strategies. This guides the development of subordinate training programs and influences the commander’s training strategy. The commander’s training strategy and the unit’s training philosophy will emphasize proficiency in performance of tasks essential for success. Commanders emphasize attaining and sustaining required levels of knowledge, skills, and experience necessary to accomplish the mission.

![Figure 7-1. Three Domains of Training](image-url)
7-13. Training of a geographically dispersed unit performing continuous operations is challenging. Successful commanders know the price of success and victory is a doctrinally sound and relevant, trained, disciplined, and motivated force. When a unit is performing continuous operations, the tendency is to forgo training due to time constraints and inability to plan. The observation is correct but the logic is wrong. The amount of time invested in training pays for itself in immeasurable ways. Training requires long-range planning projection and synchronization due to the impact at every level to include sustainment operations. Frequency and type of training follows the commander’s vision, training requirements, and the unit’s performance.

7-14. Commanders and staff use the MDMP to determine the best COA to accomplish the training if not directed by a higher level. Due to continuous operations, commanders and their staffs must plan a quarter in advance and get out in front of as many operations as possible. Ensure annual and quarterly training guidance reaches the lowest level of command 30 days prior to execution. Each level incorporates guidance from higher headquarters. Once published, the command develops training based on the priorities outlined in the guidance.

RISK MANAGEMENT AND SAFETY

7-15. The goal of the commander’s Safety Program is to reduce accidents and minimize personnel and monetary losses. Although the commander is responsible for the Safety Program, safety is everyone’s business. All personnel are responsible to make on-the-spot corrections and train to change behaviors that can lead to accidents. All individuals are responsible for their actions and held accountable for unsafe acts observed or reported. Training focused on identified negative trends as well as safety precautions unique to the recruiting operating environment minimizes future safety issues.

SUMMARY

7-16. Sustaining operations are as important as any other part of the commander’s operational plan. They enable shaping and decisive operations by providing support. Sustaining operations include logistical, recruiter and Family support, training, and force protection activities. A robust sustainment system must be functional and capable of supporting a geographically dispersed organization in order to sustain long-term mission success.
Appendix A.

ANNEX TEMPLATES FOR THE OPERATIONAL PLAN IN OPORD FORMAT (USAREC-BDE-BN)

A-1. The following is the USAREC template (Annexes)

Annexes:

A – Task Organization
B – Intelligence (G2)
C – Operations (G3) (Other operational TBD)
   Appendix 1 - Higher Command Training Priorities (Training Guidance)
   Appendix 2 – Plans and Programs
   Tab A - Future Soldier Asset Inventory (FSAI)
   Guidance Exhibit 1 - FSAI Checklist
   Appendix 3 – Semi-Annual Training Brief (SATB) Guidance
   Appendix 4 – Health Services Division (HSD) Operations
   Tab A – Special Missions Accession Board Schedule MOVE to Annex H
D – Fires (G7/9/G3/G2)
   Appendix 1 – Education plans and priorities-
   Appendix 2 – AMRG Targeting Board (ATB) Guidance
   Appendix 3 - Targeting Guidance
   Tab A – Priorities (G2)
   Tab B – Targeted Regions (G2)
E – Protection (COC/ATO)
   Appendix 1 - Annual Threat Assessment Matrix
   Appendix 2 – Anti-terrorism Awareness Month
   Appendix 3 – Safety
F – Sustainment (G4/8 / G1/ Chaplain/OCP)
   Appendix 1 – Contract Support Integration
   Appendix 2 – Financial Management
   Appendix 3 – Personnel Services Support
   Tab A – Equal Opportunity
   Tab B – Non-Deployable Personnel Report
   Appendix 4 – Religious Support
   Appendix 5 – Behavioral Health
G – Engineer (Omitted)
H – Signal (G6) (As required)
   Appendix 1 – Live Scan (Example)
   Tab A – IT Support and hardware failure
   Tab B – Capture and submission of prints for Army civilians and Army Cadets
   Tab C – Additional References
Appendix 2 – Enterprise Email (Example)
  Tab A – EE Timeline and Key Milestones
  Tab B – Deployment Schedule
  Tab C – EE Pre-Migration Checklist
  Tab D – User Migration
  Tab E – EE Post-Migration Checklist
  Tab F – EE Reporting Requirements
  Tab G – Dual Persona Instructions
  Tab H – Global Address List (GAL) Update
  Tab I – VIP Migration Matrix
  Tab J – Distribution List (DL) owners Migration Schedule
  Tab K – DL Management
  Tab L – USAREC Mandatory Distribution Lists
  Tab M – Nesting Procedures for Distribution Lists
I – Not Used
J – Inform and Influence Activities (G7/9/G5)
  Appendix 1 – Public Affairs-
  Appendix 2 – Advertising-
  Appendix 3 – Outreach-
K – Civil Affairs Operations (Omitted) E
L – Reconnaissance and Surveillance (Omitted)
M – Assessment (G5 & G3)
  Appendix 1 – Strategic Planning (G5)
  Appendix 2 – Training Assessment (G3)
  Appendix 3 – Semi-Annual Training Brief (SATB) Guidance/ Assessment (G3)
N – Space Operations (Omitted)
O – Not used
P – Host Nation Support (Omitted)
Q – Knowledge Management
R – Reports (G3, G5, G7, and KO)
S – Special Technical Operations (Omitted)
T – Spare (Omitted)
U – Inspector General (IG)
V – Interagency Coordination (Omitted)
W – Spare (Omitted)
X – Spare (Omitted)
Y – Spare (Omitted)
Z – Distribution (G3 and KO)
A-2. The following is the Brigade and Battalion template (Annexes)

Annexes:
A – Task Organization
B – Intelligence (S2)
C – Operations (S3) (Other operational TBD)
    Appendix 1 – Command Training Priorities
    Appendix 2 – Plans and Programs
        (Prospecting/Processing/Interviewing)
    Appendix 3 – Quarterly Training Brief (QTB) Guidance/Assessment
    Appendix 4 – Decisive/Shaping/Sustaining
D – Fires (S7/9 / S3 / S2)
    Appendix 1 – Command Guidance
    Appendix 2 – Education Plans
        (ESS) Appendix 3 – Targeting Plans
        (S7/9 / S3)
            Tab A – Priorities
E – Protection (Protection Officer)
    Appendix 1 – Command Guidance
    Appendix 2 – Safety
F – Sustainment (S4/8 / S1)
    Appendix 1 – Contract Support
    Appendix 2 – Financial Management
    Appendix 3 – Personnel Services Support (S1)
        Tab A – Equal Opportunity
        Tab B – Non-Deployable Personnel Report
G – Engineer (Omitted)

H – Signal (S6) (As required)
I – Not Used
J – Inform and Influence Activities (S7/9)
    Appendix 1 – Public Affairs-
    Appendix 2 – Advertising-
    Appendix 3 – Outreach-
K – Civil Affairs Operations (Omitted)
L – Reconnaissnence and Surveillance (Omitted)
M – Assessment (S3)
    Appendix 1 – Training Assessment (S-3)
    Appendix 2 – RFA Assessment (All staff elements)
    Appendix 3 – Market Assessment (S2 & S3)
N – Space Operations (Omitted)
O – Not used
P – Host Nation Support (Omitted)
Q – Knowledge Management (as required)
R – Reports (S3) (as required)
S – Special Technical Operations (Omitted)
T – Spare (Omitted)
U – Inspector General (IG)
V – Interagency Coordination (Omitted)
W – Spare (Omitted)
X – Spare (Omitted)
Y – Spare (Omitted)
Z – Distribution (S3)
Appendix B.

Running Estimates
B-1. The primary staff products are analysis and intelligence. Staffs extract relevant intelligence from a vast amount of available information to support and advise the commander throughout the operations process. They collect and analyze information, then present relevant intelligence to commanders to assist them in achieving situational understanding to make decisions. The relevant intelligence and experience combination provide the best possible resources and support the unit. The commander completes the operations process by selecting a COA. Again, the human dimension is an important part of the equation and considered at every step.
B-2. A tool used to support this staff function is the running estimate. This appendix discusses estimates and their essential qualities and provides a generic running estimate format.
B-3. The foundation of an effective running estimate is identifying the information collection requirements of the section. It includes an evaluation of how factors in a staff section’s functional area influence each COA, provides contexts to the operational environment, and includes conclusions and a recommended COA.
B-3. Running estimates parallel the MDMP. Mission analysis, facts and assumptions, and the analysis of other factors furnish the structure for running estimates. Estimates consist of significant facts, events, conclusions based on analyzed data, and recommend how to best use available resources.
B-4. Estimates form the basis for each staff section’s recommendation during COA approval. Complete estimates contain supporting intelligence necessary to answer any questions the commander poses. Gaps in intelligence estimates help identify potential critical and priority information collection requirements. Estimates can form the base for staff annexes to orders and plans.
B-5. Running estimate details depend on a section’s functional area. All staff sections except the intelligence section have a similar perspective; they focus on friendly COAs and their supportability. The intelligence estimate focuses on market intelligence and trends most likely to affect COAs to include the competition’s reaction to proposed COAs.
B-6. The coordinating staff and each staff principal develop facts, assessments, and information that relates to their functional field. Staffs help analyze and describe an operational environment. Types of estimates include but are not limited to the eight interrelated operational variables: Political, Military, Economic, Social, Infrastructure, Information, Physical environment, and Time (PMESII-PT). Additional estimates may also include:
  • Personnel estimate.
  • Intelligence estimate.
  • Logistics estimates.
  • Information operations estimate
  • Special running estimates
B-7. Written or orally presented running estimates are acceptable. Charts and other decision support tools normally support orally presented estimates at the tactical level.

B-8. Estimates support decision-making during planning and during execution. During planning, running estimates assist the commander in choosing the best COA to accomplish the mission. Once a COA is decided running estimates support the decision-making during execution.

B-9. A running estimate is the continuous assessment of the current situation used to determine if the current operation is proceeding according to the commander’s intent and if planned future operations are supportable (see ADP 5-0). Staffs develop and deliver running estimates to support the commander’s visualization and decision-making and as an assessment tool during preparation and execution of the annual operation plan. In their running estimates, staff members continuously consider the effects of new information and update their conclusions and recommendations. Staff sections provide these updated conclusions and recommendations to the commander as required, either by situation or by the commander.

B-10. Because assessment is continuous throughout the operations process, staff sections maintain continuous estimates. During planning, estimates are a key source of information during mission analysis. Thus, during planning, running estimates focus on supporting that decision. During preparation, running estimates focus on any command decisions that affect the ability of the unit to execute the upcoming operation. During execution, running estimates focus on anticipated command decisions. These include, but are not limited to, decision points and decisions on whether to execute new COAs.

B-11. Comprehensive estimates consider both the quantifiable and the intangible aspects of recruiting operations. They translate strengths, systems, training, morale, and leadership into mission capabilities. Preparing an estimate requires a clear understanding of the recruiting environment and the ability to visualize the marketplace or situations requiring targeting. Estimates provide a timely, accurate evaluation of the unit, the mission, and AOs at a given time.

B-12. Estimates are as thorough as time and circumstances permit. The commander and staff collect, process, and evaluate information continuously. Staff members update their estimates as they receive new intelligence or as the nature of an operation changes, such as:

- When they recognize new facts.
- When they replace assumptions with facts or find their assumptions invalid.
- When they receive changes to the mission.
- Friendly force status.
- A change in External Force activities and capabilities.
- Civil considerations.

B-13. Estimates for the current operation often provide a basis for estimates for future missions as well as changes to current operations. Technological advances and near real-time information ensure estimates are continuously updated and current. Estimates contribute to this understanding and ability.
B-14. Figure B-1 shows a generic format for written running estimates. Doctrine proponents for staff functional areas may establish formats for written running estimates and graphic products for their functional areas.
1. MISSION. Show the restated mission resulting from mission analysis.

2. SITUATION AND CONSIDERATIONS:
   a. Characteristics of the area of operations
      (1) Weather. State how weather affects the staff section’s functional area.
      (2) Terrain. State how terrain features affect the staff section’s functional area.
      (3) Civil considerations. State how political, economic, sociological, and psychological factors and infrastructure affect the staff section’s functional area.
      (4) Other factors. State any other pertinent factors and how they affect the staff section’s functional area.
   b. Market forces. Discuss market dispositions, composition, capabilities, and courses of action (COAs) as they affect the staff section’s functional area.
   c. Friendly forces.
      (1) List the current status of resources within the staff section’s functional area.
      (2) List the current status of other resources that affect the staff section’s functional area.
      (3) Compare requirements with capabilities and recommend solutions for discrepancies.

3. COAs
   a. List the COAs that were war-gamed.
   b. List evaluation criteria identified during COA analysis. All staff sections use the same evaluation criteria.

4. ANALYSIS. Analyze each COA using the evaluation criteria identified during COA analysis.

5. COMPARISON. Compare COAs. Rank order COAs for each key consideration. A decision matrix usually supports comparison.

6. RECOMMENDATIONS AND CONCLUSIONS.
   a. Recommend the most supportable COA from the specific staff perspective.
   b. List issues, deficiencies, and risks with recommendations to reduce their impacts.

Figure B 1. Generic Running Estimate Format
Appendix C
An Operational Design Methodology to Shaping Operations Vignette

C-1. Operations: Road to Military Opportunities Day is a true story about a battalion commander, with no recruiting experience, assessing and changing a paradigm of military service that existed in the Mid-Atlantic Recruiting Battalion. This story presents a battalion commander’s use of Mission Command and the operational approach to develop a shaping operation. It illustrates how he changed an undesirable standard, how he maneuvered to contact with state and local government and educators, while winning the hearts and minds of the opposing population. This case study reveals how a recruiting leader was able to reduce or eliminate the time-hardened barriers to the target market (Grad and Senior Test Category I-IIIA). The Road to Military Opportunities Day enabled welcomed access to recruiters, allowing them to reach their targeted audience, at the right time, in the right place, and with the right message about opportunities in the Military.

Vignette – Operation Road to Military Opportunities Day

Understand: LTC Smith, a Special Forces Officer stationed in Hawaii, receives orders assigning him as a Battalion Commander to his home state of New Jersey. His mother is happy learning that her son and grandchildren will be closer to home. She warns LTC Smith that his new assignment will not be easy. He thought for sure she was mistaken, given the level of patriotism in that area, he soon learns that his mom was in fact right. Upon his assignment as a recruiting battalion commander, LTC Smith quickly assessed his operating environment using ADM and operational approach to understand the full extent his new operational environment. He spoke with every member of his command and began to visualize the operating environment. He learned they were working 90-hour weeks, estranged from their families, failing at PT, and still not making mission in spite of their sacrifices. The final piece of the puzzle fell into place after a high school secretary purposely excluded all of the services from an annual Career Day by changing the date and informing everyone except the military. Worse yet, she had been doing the same thing for more than 20 years (in her words), to “protect the students from the military!

Visualize: By understanding the operating environment, LTC Smith used the ADM and operational approach to develop solutions to help his recruiters and the other services gain access to 209 previously closed to military high schools. Using similar tactics employed by Special Forces designed to win the hearts and minds of the local population, he began to educate and inform decision makers and influencers by telling his Army Story, and the Army Story of several other Soldiers, which he nested with his own.

Each story involved real-world situations and circumstances that included Army programs and how the Army could be a pathway to a personal goal. Each story
created a picture of the possibilities that shattered barriers standing in the way of achieving or confirming a career choice, and in some cases – a life’s passion. Each time he told his Army Story, LTC Smith won the hearts and minds of the naysayers who thought they were protecting, but in fact, were harming their students. By telling his Army Story, he visualized his intent by describing the primary objective – To speak with the juniors and seniors in each high school at an event called Military Opportunities Day – MOD.

**Describe:** LTC Smith described his vision at more than 110 PTA meetings and at meetings with the New Jersey School Board Association. Soon, he found himself meeting with New Jersey Lieutenant Governor. She put him in front of the New Jersey Red Tape Review Commission, which ultimately led to a meeting with state Governor who signed a Proclamation designating September as Military Opportunities Month throughout the state of New Jersey. By describing his vision, he created a positive operational environment and opened the doors for recruiters through actions taken by the highest State-level decision-makers.

**Direct:** LTC Smith directed his recruiting companies to implement Military Opportunities Day throughout their footprint. Several recruiting stations captured the results of the operation, through After Action (AAR) Reports, describing WHO, WHAT, WHERE, WHEN and WHY along with documenting the outcomes and providing pictures of each MOD event. The AARs serve as visual descriptions that motivate others to take or continue actions to present Army opportunities in previously closed high schools due to the misrepresentation of the Military.

**Assess:** On one hand, the AARs provide a visual indicator of what right looks like, and on the other, they identify areas of improvements. In one case, LTC Smith spoke to 800 High School Juniors and Seniors, resulting in “…multiple appointments and follow-ups with students and parents…”. In another case, a MOD AAR reported just 10 parents, and 12 students – one of which was a freshman, who attended an evening event just to learn more about the Army. The ongoing and continuous assessment helps LTC Smith to identify and document which TTP works best in reaching the largest audience possible to achieve the intended results. Increases in contacts with juniors and seniors, enlistment contracts, and ROTC scholarship enrollments, measures success, all of which are pre-established in LTC Smith’s shaping operation matrices.
Glossary

Section I.
Abbreviations

AAR after-action review
ACS Army Community Service
ADOS-RC active duty for operational support-Reserve Component
AER Army Emergency Relief
AI area of influence
AO area of operation
A&PA advertising and public affairs
AR Army Reserve
ASVAB Armed Services Vocational Aptitude Battery
BJA brigade judge advocate
COA course of action
CP community partners
CSM command sergeant major
DCO deputy commanding officer
DOD Department of Defense
EOA equal opportunity advisor
E/CP educator/Community Partners
ESS education services specialist
FAP Family Advocacy Program
FAPC Family advocacy program coordinator
FSTP Future Soldier Training Program
HQ USAREC Headquarters, U.S. Army Recruiting Command
HR human resource
IMO information management officer
IT information technology
MAI market area of interest
MAP mission accomplishment plan
MDMP military decision-making process
MEPS military entrance processing station
MMA market and mission analysis
MT master trainer
NCO noncommissioned officer
PAE positioning analysis and evaluation
QMA qualified military available
RA Regular Army
RMS resource management specialist
ROI return on investment
R2PC Recruiter and Reserve Partnership Council
RRC Recruiting and Retention College
SFAP Soldier and Family Assistance Program
SFAPC Soldier and Family assistance program coordinator
SMB U.S. Army Special Missions Brigade
SME subject matter expert
SRP School Recruiting Program
TAIR Total Army Involvement in Recruiting
TPU Troop Program Unit
**USAREC** U.S. Army Recruiting Command

**USMEB** US Army Marketing Engagement Brigade

**VIP** very important person

**VRS-** virtual recruiting station

**XO** executive officer

**Section II. Terms**

**Applicant**
A prospect who has agreed to process for enlistment.

**Lead**
A name with an address, telephone number, or e-mail address and for whom no appointment has been made for an Army interview.

**Prospect**
A person who has indicated interest in an enlistment or commission to a recruiter directly or indirectly through face-to-face or telephonic communication or by Lead Evaluation and Distribution System, Community Partners, Delayed Entry Program referrals, and/or hometown recruiter aids.
FOR THE COMMANDER:

CARTER L. PRICE
COL, GS
Chief of Staff

Official:

RONNIE L. CREECH

Assistant Chief of Staff, CIO/G6

DISTRIBUTION:

United States Army Recruiting Command. To be distributed in electronic media. Distribution Restriction:
Approved for public release; distribution is unlimited

26 September 2019