

Development of Rapid KM Capability in a US Joint Task Force

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1. About the Case Organization

As a US Government Civilian KM Strategist, operating in an austere location outside the US, I was posted to support a US military task force HQ. The staff, of approximately 75, worked with a host nation counterpart force. This case reflects a six-week segment within a 3-month deployment during the summer of 2019.

I serve in a rapid deployment unit that provides planning and KM support to such HQs. We form tailored, multi-functional teams comprised of planners of various skillsets, public affairs (public information) experts, and knowledge managers. We deploy globally for up to 120 days – or until full-time supporting staff arrive. On this particular trip, the team comprised five planners and a knowledge manager (me). For the first month and a half, I supported the main HQs, updating their operating rhythm and documenting key processes. I was later repositioned to a subordinate Task Force HQ to help its new leader reset his staff and fix some identified problems.

My team employs a "deliberate approach" KM method focused on improving operating rhythm – that is, the meetings that lead to decisions – and mapping/documenting repeatable processes. We also craft an KM/IM strategy and governance framework as well as help to foster a more effective collaborative culture. Aspects of all of these elements are at work in the case we will now explore.

2. About the Challenge

The incoming Task Force Commander wanted better organization of his staff's operating rhythm. He had two problems: (1) Making sure he synchronized his staff with the next two levels of HQs, and (2) Making sure he synchronized his staff with the Host nation counterpart organization with whom he was co-located. Among his concerns were the number of internal meetings and the external meetings they had to participate in with their higher HQs and Host nation counterparts. The schedule was dynamic with many unscheduled changes. There were a slew of actions the staff and units participated in daily; mid-term manning and equipping efforts; and considerations for longer-term planning and campaigning.

The Task Force staff numbered approximately 75, including some support contractors. They operated several out-sites as well. This Task Force had advisory responsibilities to an elite Host nation organization commanded by an experienced and capable senior General Officer. It was a component of a US-led Joint Task Force (at the next level) and by a NATO-designated HQ two levels up. Additionally, the Host nation forces had their own structure within which the Task Force had to operate. Operational and logistical actions often had to be orchestrated across all these levels.

The staff was built around a core unit whose job it is to provide staff support to such a HQs. The Chief of Staff had never served in that role before. While he was a very capable officer, orchestrating the actions of a diverse staff within this broad structure was not a part of his experience. He was a part of the unit that formed the core staff. This unit arrived about two months before the new Commander, so they were just settling into their predecessors' existing processes, systems, and operating rhythm.

But they recognized early on that there was room for improvement and change.

The Task Force did not have a designated Knowledge Management Officer nor someone to assume that role. I was tasked to travel to this Task Force HQ and help establish some good, sustainable KM practices.

3. What We Did

- a) My principal task was to adjust the Task Force operating rhythm so that it included not only current operations (i.e. focus on "the now," but also upcoming operations (focus on "the next") and future plans (focus on "the future").

Using the "Deliberate Approach" KM techniques for which my unit is known, we chartered all the meeting events. We reviewed each for its value to the Commander's decision cycle. We quickly determined that most meetings focused only on the current day or two. Nothing focused on the longer-term, and the mid-term events were dealt with in ad hoc fashion.

By consolidating some events, removing others, and adding needed ones, the Task Force now had events that covered activities in the immediate present, the near term, and looking at a more extended range. It allowed them to focus on their Host nation mission partners in the morning before focusing on US-centered tasks in the afternoon - in preparation for the evening's operational activities.

- b) Another significant challenge was reducing the number of emailed updates to the Commander from across the staff and the various "out-sites." To this end, I helped develop and implement helpful information-sharing processes. We (the Chief of Staff and I) created a tool called a "DOWNREP" - a nightly roll-up of activities across the staff.

We crafted this in a series of steps:

- (1) We comprehended what the Commander wanted to know from his staff and out-sites, establishing reporting parameters. (Not too restricted, but focused on things that either answered a question, drove an action, or required a decision.)
- (2) We mapped the process for information collection and how the Chief of Staff would consolidate reporting when he would transmit the final version (and how).
- (3) We used several tools to foster simple collaboration. OneNote was used by the staff and out sites to provide their entries and updates. The OneNote was on the Task Force (TF) portal on a specific "DOWNREP" page (with a link to it posted on several other TF portal pages for quick navigation).
- (4) The Chief of Staff posted the final report as a PDF in a specific document library, sharing the link by email to the Task Force leadership. (Eventually, each leader was subscribed to that library and got update emails automatically.) The Commander received an emailed roll-up - 1 report instead of 17. Since the entries followed a basic format, it made for more digestible reading.

The DOWNREP also facilitated updates from operating rhythm events that occurred on that day. This process helped do two things: communicate specific guidance and direction from the Commander or key leaders, and reduce the number of extraneous visitors to meetings since the updates were reliably shared in a timely manner. We were able to implement this

from start to comfortable execution in about five days.

- c) I also mapped a critical process that involved both the US personnel and their Host nation counterparts. The Host nation unit would receive a mission directive from their higher HQs. However, there were various sources for these directives. One or both of the US or Host nation staffs would sometimes misunderstand or miscommunicate the details. Thus, what the staff presented to the Host nation Commander for approval did not always match what the higher HQs directed or represented a common understanding. We were able to help refine this process.

First, I explained our KM method to the Host nation Commander (through a translator). Then, I facilitated meetings with both US and Host nation officers to map the mission receipt, planning, and approval processes. Once all parties could visualize each of the steps, and the interdependencies, there was better planning integration between the Task Force, the Host nation command, and the other HQs. There were fewer “errors in translation,” and the processes moved faster to decision – giving those that had to do the work more time to prepare.

4. Challenges and Lessons Learned

Barriers:

- Time and tempo remain significant challenges. This was a fast-moving HQs with new activities occurring daily. Stopping to learn a new way was not a choice. Instead, implementing change required trust relationships to be built quickly. This isn't easy to develop on the fly.
- We also had to work through many language barriers. This included the difference in spoken languages (requiring translators) and sharing the language of KM to two staffs each with limited experience in it.

Lessons:

- Leader engagement - regularly and often - is vital to a successful KM effort. Good "work" conversations are necessary, and rapport is built on an interpersonal level, where possible.
- I succeeded in part by gaining leader buy-in early. When the new Commander arrived and asked for KM assistance, I had already established what KM could do to help him. The Chief of Staff also was a significant help by driving the KM-driven change as HIS program, not just an interesting KM experiment.
- I succeeded in implementing an effective operating rhythm by explaining the benefits plainly but directly, and having easy to use and understand tools that helped solve the problem.
- By understanding the problem to solve, and then mapping the process, we developed/selected tools that actually supported the Task Force commander's needs and were easy to adopt. We used this approach in lieu of coming up with a tool or technical solution *first*, and then manufacturing a process that the organization would have to adopt.

5. Impact and Benefits

What have been the business benefits of your effort so far?

The Commander, the Chief of Staff, and much of the staff saw the direct benefits of KM. By making some simple but bold improvements - supported by leadership - the Task Force was able to gain valuable time for its myriad activities.

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They noted the most significant change was how they could reduce the number of meetings and remain aligned with the next two levels of HQs. By arranging events and reducing the extraneous demands on their operating rhythm, I was able to give the Task Force essentially a full day back for other operational tasks and activities.

The DOWNREP helped reduce email and created a more robust "running record" of activities in the Task Force. This tool provided better cross-staff coordination and information sharing.

What do you think were the main reasons for your progress?

I was successful in part because of the initial conversation I had with the prospective Commander before we deployed. When he arrived to assume command, he asked for KM support from his higher HQ, and I was detailed to his Task Force.

The leadership and the staff were receptive to help and open to new ideas. Many of the successes came from their feedback, and with which we made adjustments.

If you didn't have KM, what could happen?

Bottom line - without KM, that staff would have had to work way harder than necessary to accomplish its tasks. They would have "fought through" a plethora of meetings - either imposed on them or created without any specific rationale.