

Lesson 2

Staff Work

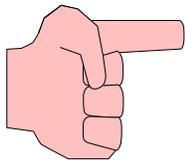
Overview

Introduction Staff work is as much a part of our Army as weapons and soldiers. Action officers are members of staffs and do staff work.

Purpose This lesson explains who action officers are, what staff work involves, and what it takes to get it done.¹

It suggests ways to develop personal attributes required for staff work and acquire skills to perform common staff functions.

Objectives After completing this lesson you should be able to--



- Describe action officer attributes and ways to develop them.
 - Provide information in usable form.
 - Use information to build trust.
 - Prepare completed staff work.
-

In this lesson This lesson contains the following maps:

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The Action Officer's World

Introduction This map explains what action officers do and what it takes to get it done.
Note: We've already defined the terms, *action officer* and *action* but repeat them here to refresh memory.

Definition: action officer An action officer (AO) is a staff member with subject-matter expertise who *works actions* on behalf of senior staff officers or commanders.

Definition: action An action is a task usually requiring coordination and the tasking authority's approval in its final form. It could be a--

- Simple one-time task taking five minutes with a pen, paper, and telephone.
- Major project taking several months, requiring extensive correspondence, and involving dozens of players.

Definition: working an action Working (or running with) an action means doing everything required to complete it, including all its supporting tasks.

Examples of working (or running with) an action:

- Obtaining guidance from a decision maker.
 - Developing a position on an issue.
 - Visiting offices to get concurrence (*chops*) on a proposal.
 - Negotiating with opposing players.
 - Making slides for a briefing.
 - Briefing a proposal to obtain a decision.
 - Preparing a letter for the CG's signature.
 - Drafting a message for worldwide dispatch.
 - Representing your command at a major conference.
-

What action really means Over forty years ago General W. B. Palmer defined what it means to be an action officer:



An army exists for only one purpose: action. The staff exists only to produce action. We call you an action officer because we want action. All you are here for is to get something done. A paper, any word you write, is wasted effort unless it directly contributes to getting something done. You may have a long hard task, a lot of research, a lot of conferences, a lot of concurrences: but all the time your mission is to find that solution and get something done.²

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The Action Officer's World, Continued

The staff A staff exists to serve a commander and support subordinate commanders and staffs. It frees a commander from myriad details of running a complex organization, by managing functional areas such as personnel, logistics, or resource management. A staff also helps a commander make decisions by providing information and making recommendations.

Supervisors, senior staff officers, and commanders An action officer works for many bosses. Your relationships with other staffs expose you to supervisors, senior staff officers, and commanders at several levels, both inside and outside an organization. Interacting with these folks is an exciting experience and a means for professional growth.

Examples:

- Immediate supervisor.
- Division chief.
- Secretary of the General Staff (SGS).
- Executive officer.
- Chief of staff.
- Commanding general.
- Project manager.
- Staff officer from a sister service.

Tip: When working with other bosses, *always* inform your immediate boss on the situation.

Life on a headquarters staff The staff environment in a major headquarters while exhilarating is also demanding. This atmosphere is characterized by--

- A sense of urgency surrounding issues and actions.
- Unexpected questions.
- Proximity to flag officers and senior executives.
- High volume of actions handled every day.
- Necessity for extensive coordination.
- Challenge and frustration of getting folks to support a position.
- Crash projects.
- Short deadlines and lack of resources to meet them.
- In-boxes that remain full.³

Attributes The next four maps describe attributes required for surviving in this highly charged environment, including ability to--

- Anticipate requirements.
- Display initiative.
- Seek or follow guidance.
- Maintain perspective.

Anticipation

-
- Introduction** Ability to anticipate events helps you--
- Avoid surprises.
 - Discover what's needed and ask for it in time.
 - Make future plans.
 - Run in the fast lane.
-

- Don't get ambushed** Don't get ambushed--war-game the action:
- Use checklists, SOPs, and experience to identify potential problems.
 - Look at things from different angles.
 - Identify *show stoppers* in advance.
 - Think about possible questions and answer them beforehand.
 - Seek advice from more experienced people.
-

- Examples** Examples of war-gaming the action:
- Send out the agenda early, so members can contact you on issues.
 - Don't omit an agency bearing on the problem or its solution.
 - Be aware of how the action affects the whole organization.
 - Don't fall in love with a solution; the boss may not be able to implement it.
-

- Be prepared for sudden taskings** Be prepared for taskings at any time (like when your boss's boss spots you in a hallway and tasks you with an action on-the-run). Ensure you understand the requirement immediately.
- Otherwise, you risk the embarrassment of--
- Going back to get information you should have asked for originally.
 - Doing the wrong work then having it rejected.
 - Asking for more time, because you must start over.
-

- Don't be intimidated** When a fast-talking boss assigns an action, don't be intimidated:
- Rephrase the requirement to confirm what's expected.
 - Don't be afraid; if you don't understand, ask for clarification.
- If later you still need more information, get on the person's calendar right away to discuss the issue further.
-

- Carry survival tools** To keep your wits when running in the fast lane, always carry these survival tools:
- Pen or pencil.
 - A little notebook or 3x5 cards.
 - List of *smart* questions (memorized or in a notebook). Sample on next page.
-

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Anticipation, Continued

Ask smart questions

Wrap your arms around the action: ask questions like these:

S m a r t q u e s t i o n s :

W h e n i s t h e a c t i o n d u e?

W h o a m I w r i t i n g f o r?

A n y s p e c i f i c g u i d a n c e?

D o y o u w a n t t o s e e a d r a f t b e f o r e I g e t c h o p s?

W h o t o i n v o l v e i n p u t t i n g a c t i o n t o g e t h e r?

K e y p e o p l e t o a t t e n d d e c i s i o n b r i e f?

H i d d e n a g e n d a s?

Figure 2-1. List of smart questions⁴

Initiative

- Introduction** A sharp action officer is a self-starter who doesn't--
- Camp at the boss's door waiting to be told what to do.
 - Ask what to do next.
 - Seek detailed instructions.
 - Ask for solutions to problems he's capable of solving.

Any self-starter gets things done without close quarterbacking from his boss.

Action officer initiative

MG Perry Smith (USAF, Ret.) notes the value of initiative in an action officer: Senior officials really appreciate action officers who take initiatives, work out happy compromises, solve problems, and come up with innovative solutions to tough problems. The action officer who keeps throwing the problem back to bosses, who offers to hold the bosses' coats while they fight a battle that the action officer could have prevented, and who are problem creators rather than problem solvers normally fail.⁵

Levels of initiative

How much initiative should you take? Look at this graphic. Try at least to operate at Level 3. This enables you to prepare *completed staff work* without detailed instructions and close supervision. As you gain expertise, try to operate at higher levels of initiative.

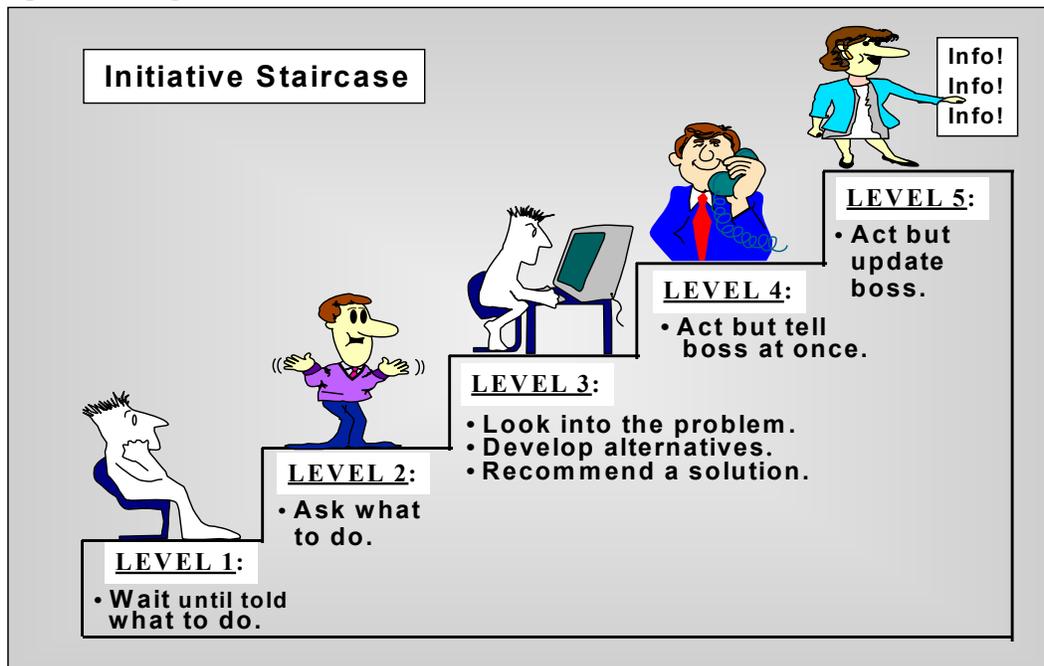


Figure 2-2. Seize the initiative⁶

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Initiative, Continued

Taking a position

The people you work for are too busy to take positions on all issues. They rely on you to--

- Keep information updated.
 - Form well-reasoned opinions.
 - Be ready to promote or defend them.
-

Be prepared

If bosses ask for advice on short notice, always be prepared. Keep current fact sheets, information papers, and briefing slides on hand to *fill their plates* on a moment's notice. Don't get into the barrel:

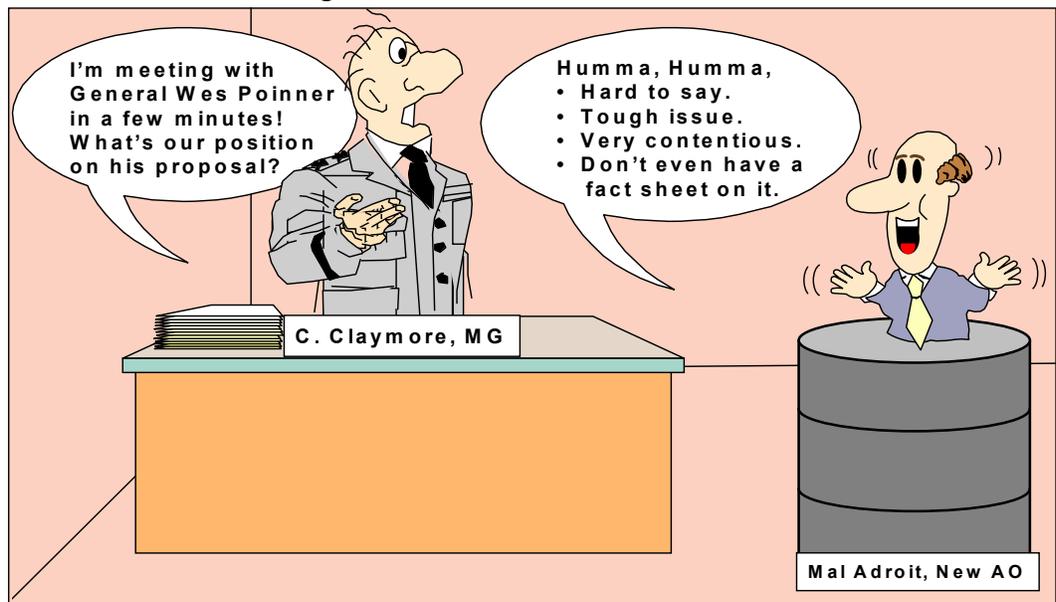


Figure 2-3. Take clear positions on issues⁷

Using initiative when coordinating

Aggressively (but tactfully) use initiative to coordinate:

- Seek out those affected and touch base with them.
 - Ask questions but don't blindly accept answers.
 - Push and pull information; it doesn't flow naturally.
 - Check and recheck to ensure information is accurate.
 - Use multiple sources to confirm facts.
-

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Initiative, Continued

Keeping actions visible

Take initiative to move an action if it loses visibility or someone is sitting on it:

- Always know where the action is.
 - Enlist people to support the action (missionary work).
 - Maintain frequent contact with those involved.
 - Report the action's status (PERT diagrams, milestones, charts, significant activities reports).
 - Pre-brief key players.
 - Diplomatically remind people to chop on the action.
 - Force the issue--use meetings, memos, calls, and visits to bring the issue to the forefront.
-

Following up

Yogi Berra once said, "It ain't over till it's over." Following up on an action is as important as preparing it for signature. Don't simply drop an action into an in-box and forget it. This is a sure way to lose it or miss the suspense date.

Ways to follow up

Here are some ways to follow up:

- Gently nudge people to move the action--your boss, executive officer, or decision maker's secretary.
 - Contact key players to ensure they understand the requirement.
 - Check to ensure everybody is reading from the same sheet of music.
 - Provide information or other assistance, so people can meet the requirement.
-

Passing an action

Don't assume every action landing on your desk is your action. Sometimes the tasking authority makes a mistake. If this happens, take the initiative to pass the action to its rightful owner:

Step	Action
1	Contact the office of primary responsibility.
2	If they accept the action-- <ul style="list-style-type: none">• Pass it to them and inform the tasking authority, or--• Return the action to the tasking authority with routing instructions.
3	If they refuse, return the action to the tasking authority (chief of staff, executive officer, SGS) for resolution. <u>Note:</u> Organizations usually have a routing form for passing actions.

Guidance

Introduction Most decision makers appreciate an action officer who can work without detailed instructions and close supervision. Rather than giving details on how they want something done, they issue guidelines for what they want done.

Definition: guidance Guidance is information or advice a decision maker provides when assigning an action. It's a broad form of direction encouraging self-reliance and initiative to solve problems.

Reasons for providing guidance Proper guidance removes constraints of detailed instructions and close supervision. By delegating details and procedures to you, the decision maker avoids micro-managing and can focus on larger issues.

Degree of guidance sought or provided The degree of guidance you'll seek or be provided depends on--

- Personal expertise and experience.
- Information and other resources available.
- Complexity of the task.
- Decision maker's management style.

Examples of guidance Areas where a decision maker might provide guidance:

- Desired results.
- Conditions a solution must satisfy.
- Things that can't go wrong.
- What must remain unchanged.
- Resource constraints.
- Acceptable alternatives.
- People to contact.
- Political or protocol considerations.
- Sources of contention.

Advantages of working under broad guidance Working under broad guidance--

- Eliminates need for close supervision.
- Provides flexibility to choose means for accomplishing the task.
- Encourages initiative.
- Builds morale and self-confidence.
- Unleashes creativity.
- Leads to imaginative solutions.
- Promotes personal growth.

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Guidance, Continued

When to seek guidance

Seek guidance in these circumstances:

When you must	When the decision maker has
Clarify the requirement.	Information you need.
Resolve conflicting priorities.	Strong views about the issue.
Reconcile deviation from previous guidance.	Committed to a course of action.
Complete the task in little time.	Expertise on the subject. ⁸

Sources of guidance

Draw on these sources of guidance. Depending on availability of information and accessibility of people, take these steps:

Step	Action	Examples
1	Deduce guidance from information sources.	<ul style="list-style-type: none"> • Organization's mission and goals. • Personal expertise. • Information network. • AOs familiar with the action. • Regulations, policies, SOPs. • Commander's-- <ul style="list-style-type: none"> .. Intent. .. Management style. .. Personality.
2	Consult people who originated the tasking.	<ul style="list-style-type: none"> • Higher headquarters. • Outside agencies. • Commander. • Chief of Staff. • Secretary of the General Staff (SGS). • Commander's Planning Group. • Protocol office. • Immediate boss.

Note: Action officers usually obtain commander's guidance through the chief of staff, SGS, or executive officer.

Perspective

Introduction This map explains why we need perspective and suggests ways to acquire it.

Definition: perspective Perspective is the ability to see things in their true relationship. This quality is vital to an action officer:

- It gives one *a feel for the problem*.
- Makes it easier to shape information.
- Leads to the best solution.

Conversely, one who lacks perspective lives in a world of parochial views and immature solutions--deficiencies a commander can't tolerate.

Gaining perspective In addition to personal growth, action officers gain perspective through teamwork and cross training.

Teamwork A staff operates as a team. Staffers should know functions of fellow staff members almost as well as they know their own. This is essential for staff effectiveness, because actions usually involve players from higher, lower, and adjacent staffs, both internally and externally.

While accomplishing much on your own, you'll usually need help from others. Working in a team setting helps one gain perspective by--

- Getting needed information from people who have it.
 - Allowing devils' advocates to expose weaknesses in your thinking.
-

Barriers to teamwork Some people aren't team players because they're afflicted with a *do-it-yourself* mentality, driven by excessive pride, or blinded with obsession.

Do-it-yourselfer Sometimes one action officer will possess more expertise in a certain area than anyone else in the organization. While this action officer may gain visibility and prestige, he'll also cause problems if unwilling to share knowledge or work with others. Here's what happens to a *do-it yourselfer*:

It makes one	Which leads to
Indispensable	Overwork and exhaustion.
Arrogant	Antagonism.
Narrow-minded	Parochialism.
Aloof	Alienation.

A *do-it-yourself* approach is fine for home repairs but not in the workplace. It will prove a hindrance when trying to manage events and lead people.

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Perspective, Continued

Pride, passion, and obsession

Have you ever prepared a good piece of staff work, only to see some low-level bureaucrat or insecure boss make it unrecognizable? Rarely, however, will an action sail through the system without someone changing it. As it moves through coordination channels, people reviewing it will also add perspective.

The tendency is to react to such circumstances emotionally. While you should vigorously defend your position, also recognize these emotional forces:

Pride (pride of workmanship) is virtuous. Excessive pride, however, leads to uncontrolled passion or obsession.

Passion is an intense drive or strong love for an object. It too can be virtuous. However, uncontrolled passion degenerates into self-destructive obsession.

Obsession is unreasonable persistence or fixation that obscures reality.

Unethical behavior

Excessive pride or obsession clouds judgment and leads to unethical behavior:

Examples:

- Refusing to accept honest dissent or constructive criticism.
 - Making personal attacks on opposing players.
 - Lying.
 - Withholding information to protect your position.
 - Undermining the decision.
-

Overcome shortcomings

To overcome excessive pride or obsession--

- Know when to hold and when to fold.
 - Prepare excellent work that withstands unfounded criticism.
 - Build trust with peers and key players.
 - Use persuasion before resorting to debate.
 - State views frankly but support the final decision.
 - Learn the distinction between passion and obsession.
-

Cross training

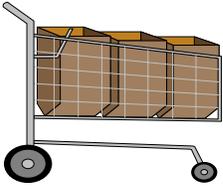
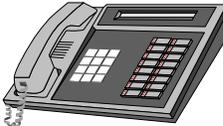
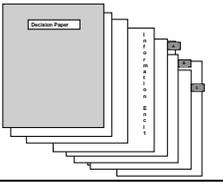
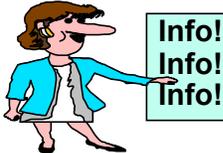
Learning duties of fellow action officers--

- Enhances personal growth.
 - Adds to personal influence.
 - Spreads workload.
 - Increases your boss's flexibility when assigning tasks.
 - Strengthens the team.
 - Keeps you from becoming indispensable.
 - Builds morale (able to take leave--peers capable of filling in).⁹
-

Information Processes

Introduction To make sound decisions, decision makers need timely and accurate information. They rely on action officers to manage it and provide it in usable form.

Processes These are processes for managing information:

Process	Description
Gathering 	Devising a collection plan to maintain a data base sufficient to support current and future estimates. <u>Note:</u> <ul style="list-style-type: none"> • <u>Do</u> ensure requests for information are necessary. • <u>Don't</u> burden other staffs or subordinate commanders with requests for unnecessary information.
Analyzing 	Sorting, sifting, and assessing information for its-- <ul style="list-style-type: none"> • Significance. • Completeness. • Reliability.
Condensing 	Keeping only essential information and shaping it so it's-- <ul style="list-style-type: none"> • Usable for making decisions. • Quickly retrievable. • Formatted for rapid update.
Exchanging 	Giving folks what they need and getting what you need, by trading information through-- <ul style="list-style-type: none"> • Personal conversations. • Meetings. • Messages.
Formatting 	Using appropriate medium for the situation and considering the decision maker's preferences: <ul style="list-style-type: none"> • Hand-written 3x5 card. • Decision package. • Fact sheet. • E-mail.
Informing 	Providing the right information to the right people: <ul style="list-style-type: none"> • Keeping key players updated. • Promptly informing higher, lower, and adjacent staffs. • Giving out just enough information and <u>not</u> overloading folks, especially the commander.

Written Sources of Information

- Introduction** Staffs use various documents to define administrative procedures, maintain control, and ensure continuity of information:
- Policy file.
 - Records.
 - Organization and Functions Manual.
 - Staff Guide.
 - Standing Operating Procedures (SOP).
 - Workbooks.

Description This table describes written sources of information:

Document	Description
Policy File	Contains policies of command and higher headquarters, based on existing orders, experience, and past command decisions. Also outlines basic operating principles for the staff section maintaining the file. Policies may take form as notes, plans, studies, or directives. Chief of staff maintains command policy file, and each staff section keeps a section file. Policy file is a good source to orient new members.
Records	Records hold and preserve historical information. Modern Army Records Keeping System (MARKS) governs records management. (See AR 25-1 and DA Pam 400-2.)
Organization and Functions Manual	Specifies organization, functions, and responsibilities for all staff sections within a command. Also a source for assigning responsibility for staff actions and identifying coordination channels.
Staff Guide	No standard name. Contains instructions on-- <ul style="list-style-type: none"> • Document formats. • Coordinating channels. • Procedures for staffing concurrences or nonconcurrences.
Standing Operating Procedures (SOP)	Outlines standing orders for-- <ul style="list-style-type: none"> • Procedures for recurring and routine matters. • Actions involving set details and specific arrangements, such as protocol, briefings, or VIP visits.
Workbooks	Contain informal collections of information: <ul style="list-style-type: none"> • References for current operations and reports. • Indexed information from orders, conversations, messages, and conferences. • Ideas, opinions, and conclusions.

Providing Information and Building Trust

Introduction To communicate effectively, consider how people (especially your boss) like to receive information. Some want all the details in writing, while others simply prefer a meeting to discuss highlights. This graphic depicts two ways people like to receive information:

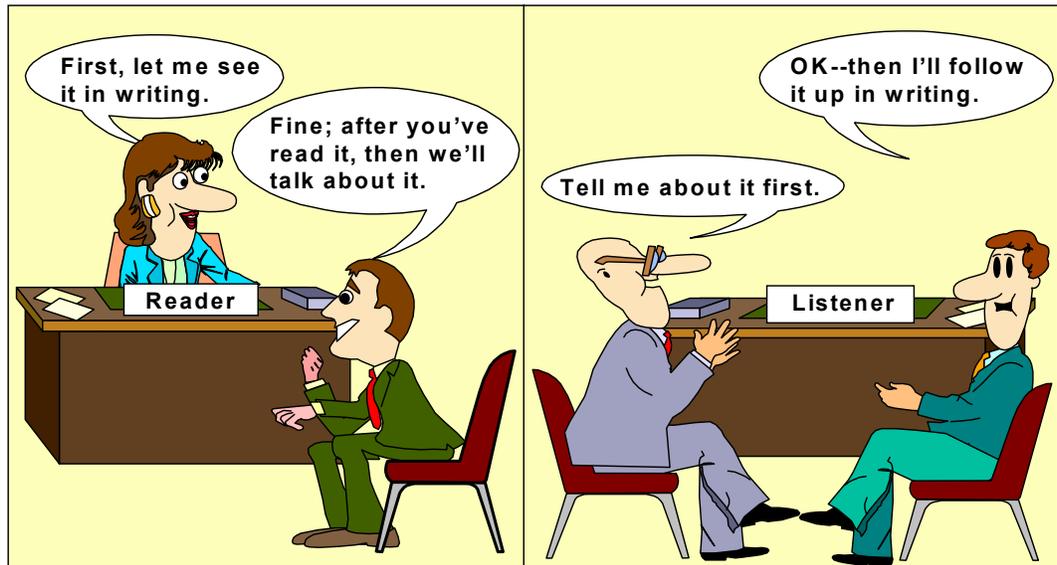


Figure 2-4. Two kinds of people--readers and listeners¹⁰

- Advantages** Adapting your approach to the recipient's style--
- Enhances communication.
 - Saves time.
 - Builds credibility.
 - Forges the relationship.
 - Increases trust.

Trust An action officer occupies a position of trust. Leaders rely on you for complete and accurate information. If they can't trust you, you'll lose credibility. Not only will this hurt you, but it will also hurt them. You may be the source of reliable information, but people won't accept it because they can't trust you.

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Providing Information and Building Trust, Continued

Mistrust

Misuse of information leads to mistrust and communications breakdown:

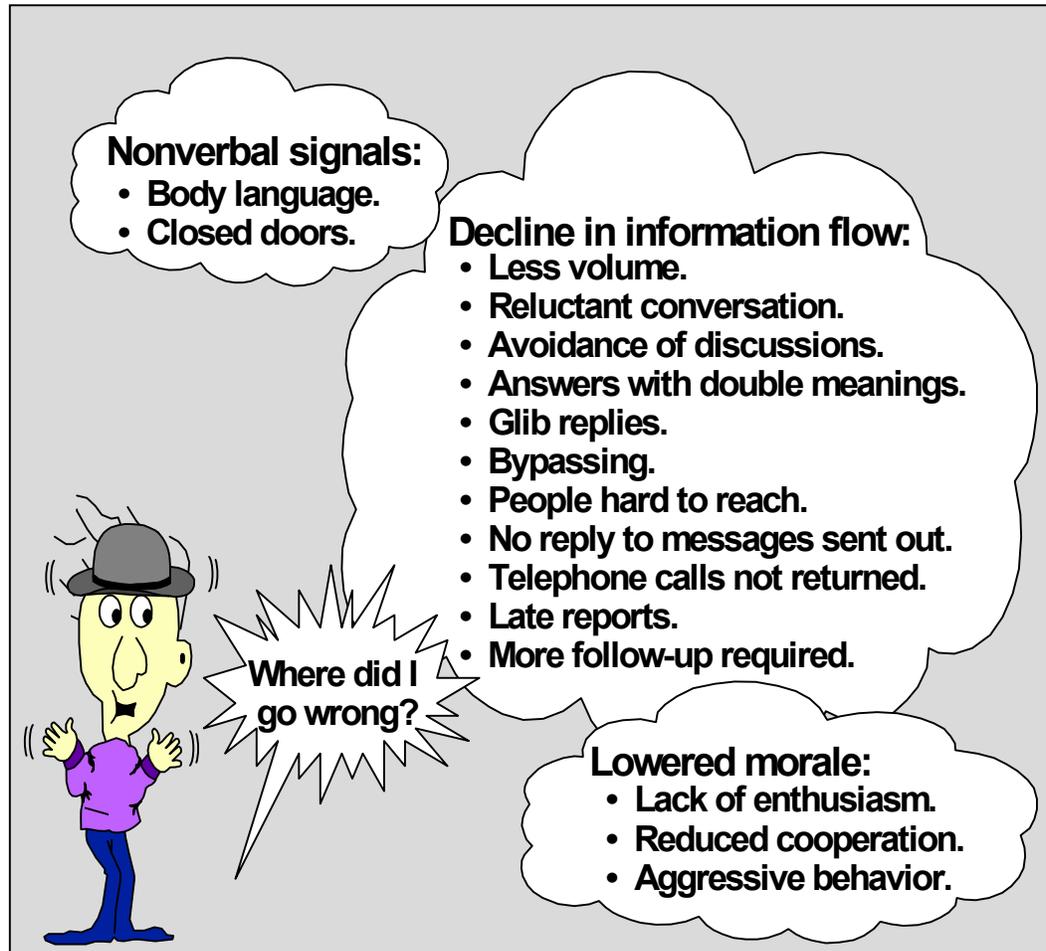


Figure 2-5. Effects of mistrust¹¹

Building trust

Act ethically when managing information--it builds trust. Use information for worthy purposes and share it generously. As word spreads you'll attract even more information and gain influence. To build trust, follow these rules:

Don't use information to	Do use information
Spread gossip.	In confidence.
Hoard as a weapon.	To get more information.
Reward or punish.	As a resource to share.
Spread harm.	To help people do their jobs.
Seek personal gain.	For the good of our nation.

Completed Staff Work

Introduction Action officers provide information to keep decision makers informed. They also shape information into recommendations, that when approved become decisions.

We refer to a recommendation that's been properly prepared and coordinated as *completed staff work*.

Definition Completed staff work is a single proposed recommendation that--

- Has been thoroughly analyzed.
 - Has been coordinated.
 - Represents the best recommendation possible.
 - Simply requires approval or disapproval.
 - Is prepared in final form for signature.
-

Examples Examples of completed staff work:

- Fact sheet stating minimum key facts essential for understanding.
 - Fully staffed decision paper that recommends a clear decision, based on discussion of pros and cons of alternatives.
 - A complete message dispatched on time to right addressees.
-

Non-examples Non-examples of completed staff work:

- Dispatching a message with incomplete information, thus requiring another message to clarify the original.
 - Submitting alternatives but failing to recommend the best course of action.
 - Submitting a recommendation for decision but not coordinating with key players who oppose it.
-

Advantages Advantages of preparing completed staff work:

- Improves quality of decisions.
 - Saves time, since it's done right the first time and needs little or no revision.
-

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Completed Staff Work, Continued

Preparing completed staff work

To ensure staff work is complete, follow the problem-solving steps in Lesson 5. Highlights of this procedure are recapped below:

Action	Description
Define the problem	The way things are.
List criteria	The way things ought to be.
Form assumptions	Conditions we can't verify.
Identify constraints	Conditions we can't change.
Develop alternatives	Ways that might solve the problem.
Select best alternative	The clinching argument: <ul style="list-style-type: none">• Outline of pros and cons.• Consideration of nonconcurrences.• A decision matrix, if it will clarify the issue.
Submit recommendation for approval	The best alternative, recommended to the decision maker with an explanation of why you chose it over the others.

Format

Typically you'll prepare a recommendation in the format of a decision paper and send (or brief) it to the decision maker. For more on this see Lessons 8 and 9.

Standards

Standards for preparing completed staff work are rigorous but flexible:

Completed staff work doesn't	Explanation
Need to be perfect.	It just has to be acceptable, in view of time or other resource constraints.
Require unanimous agreement.	Rarely will all players agree.
Always have to be in final form.	A draft that just needs fine tuning may be OK at times.

Staff Doctrine

Background The doctrine of completed staff work has been around a long time, thanks to this document published for the Provost Marshal General in 1942:

COMPLETED STAFF WORK

1. The doctrine of completed staff work is a doctrine of this office.
2. Completed staff work is--
 - . Complete study of a problem.
 - . Presentation of a completed action in such form that it simply allows the decision maker to either approve or disapprove it.

The emphasis is on *completed*, because the more difficult the problem, the more the tendency to present it in piece meal fashion.

It's your duty as a staff officer to work out the details. You should not consult your chief in determining those details, no matter how perplexing they may be. Instead, uncover the details yourself, and consult with other staff officers.

3. When faced with a difficult problem, the first impulse of an inexperienced and frustrated staff officer is to ask the chief *what to do*. It's so easy to ask, and it seems so easy for him to answer. Resist that impulse. You'll succumb to it only if you don't know your job.

Your job is to advise the chief what he ought to do, not to ask him what you ought to do. He needs answers, not questions. Your job is to--

- . Study.
- . Write.
- . Restudy.
- . Rewrite.
- . Arrive at a single proposed action.

4. Don't worry your chief with long explanations and memoranda. Writing a memorandum to your chief doesn't constitute *completed staff work*. But writing one for the chief to send to someone else does.

Your views should be placed before him in finished form, so that he can make them his views, simply by signing his name. If your solution is proper, the chief will recognize it at once. If he wants explanation, he'll ask for it.

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Staff Doctrine, Continued

Background (continued)

COMPLETED STAFF WORK, *continued*

5. The theory of *completed staff work* doesn't preclude a *rough draft*, but it must not be half-baked. Except for final touches, it must be complete. It need not be neat. However, don't use a rough draft as a means to shift the burden of completing the action onto the chief.

6. The *completed staff work* theory may cause work for the staff officer, but it results in more freedom for the chief. This is as it should be. Further, it accomplishes two things:

- . It protects the chief from--**
 - .. Half-baked ideas.**
 - .. Voluminous memoranda.**
 - .. Immature oral presentations.**
- . The staff officer who has a real idea to sell is enabled more readily to find a market.**

7. When you've finished your *completed staff work*, final test is this:

If you were the chief, would you be willing to sign the paper you've prepared and stake your reputation on being right?

If the answer is *no*, then take it back and do it over, because it is not yet *completed staff work*.¹²

In retrospect

Half a century later the doctrine of completed staff work still stands but with some modification. The chief still expects action officers to uncover details. However, today he's more likely to provide guidance, sometimes even details. The chief may be the only one who knows the details.

Often in the past one would bring an action to the chief for approval only to hear, "That's not what I wanted; take it back and do it over." Moreover, in an age of word processors and laser printers, the chief now expects even draft documents to be neat.

Lesson Summary

Key Points This table summarizes key points of lesson maps or information blocks:

Topic	Summary	Page										
Objectives	<u>Lesson objectives:</u> <ul style="list-style-type: none"> • Describe action officer attributes and ways to develop them. • Provide information in usable form. • Use information to build trust. • Prepare completed staff work. 											
The action officer's world	<p>An <u>action officer</u> is a staff member with subject-matter expertise who works actions on behalf of senior staff officers and commanders.</p> <p>An <u>action</u> is a task assigned to an action officer that usually requires coordination and the tasking authority's approval in its final form.</p> <p><u>Working (or running with) an action</u> means doing everything required to complete it, including all its supporting tasks.</p>	2-2										
Anticipation	<p><u>Anticipation</u> avoids surprises, buys time, keeps you in the fast lane.</p> <ul style="list-style-type: none"> • Don't get ambushed--war-game your action. • Ensure you understand requirement--rephrase it and ask questions. • Carry a pen or pencil, notebook, and prepared questions. • If you need more information, get on the person's calendar. 	2-4										
Initiative	<p>As a minimum, operate at Level 3 of the initiative staircase:</p> <ul style="list-style-type: none"> • Look into the problem. • Develop alternatives. • Recommend a solution. <p>Bosses expect AOs to take positions on issues, keep them updated, form well-reasoned opinions, be prepared to promote or defend them.</p>	2-6 2-7										
Guidance	<p><u>Guidance</u> is information or advice the tasking authority gives when assigning a task. It's usually broad enough to encourage initiative.</p> <p>Seek guidance--</p> <table border="1" data-bbox="428 1339 1271 1570"> <thead> <tr> <th data-bbox="428 1339 854 1377">When you need to</th> <th data-bbox="854 1339 1271 1377">When decision maker has</th> </tr> </thead> <tbody> <tr> <td data-bbox="428 1377 854 1415">Clarify the requirement.</td> <td data-bbox="854 1377 1271 1415">Information you need.</td> </tr> <tr> <td data-bbox="428 1415 854 1453">Resolve conflicting priorities.</td> <td data-bbox="854 1415 1271 1453">Strong views on the issue.</td> </tr> <tr> <td data-bbox="428 1453 854 1533">Reconcile deviation from previous guidance.</td> <td data-bbox="854 1453 1271 1533">Committed to a course of action.</td> </tr> <tr> <td data-bbox="428 1533 854 1570">Accomplish task in little time.</td> <td data-bbox="854 1533 1271 1570">Expertise on the subject.</td> </tr> </tbody> </table>	When you need to	When decision maker has	Clarify the requirement.	Information you need.	Resolve conflicting priorities.	Strong views on the issue.	Reconcile deviation from previous guidance.	Committed to a course of action.	Accomplish task in little time.	Expertise on the subject.	2-9 and 2-10
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Accomplish task in little time.	Expertise on the subject.											

Continued on next page

Lesson Summary, Continued

Key Points (continued):

Perspective	<p><u>Perspective</u>: Gives one a <i>feel for the problem</i>.</p> <p><u>Teamwork</u>. Helps one gain perspective from interacting with people.</p> <p><u>Barriers</u> to teamwork: <i>do-it-yourself</i> mentality and excessive pride.</p>	2-11 and 2-12												
Information processes	<ul style="list-style-type: none"> • Gathering. • Analyzing. • Condensing. • Exchanging. • Informing. • Formatting. 	2-13												
Written sources of information	<ul style="list-style-type: none"> • Policy File. • Records. • Orgn and Functions Manual. • Staff Guide. • SOP. • Workbooks. 	2-14												
Providing information, building trust	<p>Consider preferences of <i>readers</i> and <i>listeners</i>. Act ethically when managing information--it builds trust. Misuse of information leads to mistrust and communications breakdown. To build trust--</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: center;">Don't use information to</th> <th style="text-align: center;">Do use information</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Spread gossip.</td> <td style="text-align: center;">In confidence.</td> </tr> <tr> <td style="text-align: center;">Hoard as a weapon.</td> <td style="text-align: center;">To get more information.</td> </tr> <tr> <td style="text-align: center;">Reward or punish.</td> <td style="text-align: center;">As a resource to share.</td> </tr> <tr> <td style="text-align: center;">Spread harm.</td> <td style="text-align: center;">To help people do their jobs.</td> </tr> <tr> <td style="text-align: center;">Seek personal gain.</td> <td style="text-align: center;">For the good of our nation.</td> </tr> </tbody> </table>	Don't use information to	Do use information	Spread gossip.	In confidence.	Hoard as a weapon.	To get more information.	Reward or punish.	As a resource to share.	Spread harm.	To help people do their jobs.	Seek personal gain.	For the good of our nation.	2-15 and 2-16
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Spread harm.	To help people do their jobs.													
Seek personal gain.	For the good of our nation.													
Completed staff work	<p><u>Completed staff work</u>--a single proposed recommendation:</p> <ul style="list-style-type: none"> • Analyzed. • Coordinated. • Best recommendation. • Simply requires approval or disapproval. • Prepared for signature. 	2-17												
Preparing completed staff work	<p>To prepare completed staff work, follow problem-solving steps:</p> <ul style="list-style-type: none"> • Define the problem. • List criteria. • Form assumptions. • Identify constraints. • Develop alternatives. • Select best alternative. • Submit for approval. 	2-18												
Standards	<p>Completed staff work <u>doesn't</u>--</p> <ul style="list-style-type: none"> • Need to be perfect--just acceptable. • Require unanimous agreement--rarely will all agree. • Always have to be in final form--draft may be OK at times. 	2-18												

References

Explanation of entries Endnotes and additional reference are listed below. Highly recommended works appear in **bold print**.

Endnotes To write this lesson, we drew on these sources:

¹Lesson content derives largely from US Army staff doctrine advanced by the Command and General College at Fort Leavenworth, Kansas, and staff practices at major Army and joint commands.

²Lieutenant General W. B. Palmer, "Life Among the Indians," *Army* (February 1954): 36-38.

³**Perry M. Smith (Major General, USAF, Ret.), *Assignment: Pentagon: The Insider's Guide to the Potomac Puzzle Palace*, 2nd ed. (Washington, DC: Brassey's [US], 1993) 10.**

⁴Smith, 77-78.

⁵Smith, 84.

⁶**William Oncken, Jr. and Donald L. Wass, "Management Time: Who's Got the Monkey?" *Harvard Business Review* 52 (1974): 79.**

⁷Smith, 23-24.

⁸Smith, 94.

⁹Smith, 96.

¹⁰Peter F. Drucker, *The Effective Executive* (New York: Harper & Row, 1967) 94.

¹¹Fernando Bartolomé, "Nobody Trusts the Boss Completely--Now What," *Harvard Business Review* 67 (1989): 139-142.

¹²Condensed and edited from the original, Col Archer L. Lerch, "Completed Staff Work," written for the Provost Marshal General. Reprinted in *Army and Navy Journal* 79 (January 1942): 582.

Additional reference Recommended reference for action officers who work on joint staffs: AFSC Pub 1, *The Joint Staff Officer's Guide*, (National Defense University, Armed Forces Staff College: Norfolk, VA, 1993).

Lesson 2--End-of-Lesson Exercises

Instructions Select best answer or answers.

1. If you accept a task without understanding the requirement, you will risk--
 - a. Having to go back for more information.
 - b. Doing the wrong work and have it rejected.
 - c. Having to ask for more time, because you must start over.

2. When first assigned an action, name two ways to ensure you understand the requirement.
 - a. Write it down and send it to your boss for clarification.
 - b. Ask questions.
 - c. Rephrase the requirement to confirm what's expected.
 - d. Begin coordination with all those involved.

3. To anticipate sudden taskings, an action officer should always carry these survival tools:
 - a. A pen or pencil.
 - b. A notebook or 3x5 cards.
 - c. An organization chart.
 - d. A list of *smart* questions.

4. Name three ways to prepare yourself to take positions on issues.
 - a. Keep information updated.
 - b. Form well-reasoned opinions.
 - c. Be ready to promote or defend them.
 - d. Read the newspaper.
 - e. Watch serious TV programs.

5. Give two reasons why astute decision makers issue broad guidance when assigning a task.
 - a. It enables them to issue detailed instructions.
 - b. They avoid micro-managing.
 - c. They can focus on larger issues.
 - d. They can stay fully involved in the task.

Continued on next page

Lesson 2--End-of-Lesson Exercises, Continued

6. *Perspective* is a vital attribute for an action officer, because it--
- Gives one a feel for the problem.
 - Makes it easier to shape information.
 - Helps one to find the solution.
-
7. Information should be condensed to--
- Determine its significance.
 - Make it quickly retrievable.
 - Determine its reliability.
 - Format it for rapid update.
-
8. Situation: Your boss isn't eager to read your papers. However, your peers quickly get their papers approved by simply discussing them with the boss. What could be the problem?
- You are probably not providing enough information.
 - Your boss evidently is a *listener*, who prefers to process information orally.
 - You are probably providing too much information.
 - Your boss is evidently a reader, who prefers to process information visually.
-
9. Identify standards for completed staff work.
- Should be perfect.
 - Requires unanimous agreement.
 - Should always be submitted in final form.
 - Should be acceptable, in view of resource constraints.
-

Lesson 2--Answer Key and Feedback

Instructions Correct choices are highlighted.

1. If you accept a task without understanding the requirement, you will risk--

- a. **Having to go back for more information.**
- b. **Doing the wrong work and have it rejected.**
- c. **Having to ask for more time, because you must start over.**

(Page 2-4). *Be prepared for sudden taskings, and always ensure you understand the requirement immediately.*

2. When first assigned an action, name two ways to ensure you understand the requirement.

- a. Write it down and send it to your boss for clarification.
- b. **Ask questions.**
- c. **Rephrase the requirement to confirm what's expected.**
- d. Begin coordination with all those involved.

(Page 2-4) *Correct choices are b and c. Choice a is an option, if guidance is vague or you're still uncertain after thinking the problem through. Choice d is incorrect because it would be premature to coordinate something you're not certain of.*

3. To anticipate sudden taskings, an action officer should always carry these survival tools:

- a. **A pen or pencil.**
 - b. **A notebook or 3x5 cards.**
 - c. An organization chart.
 - d. **A list of smart questions.** (Page 2-4)
-

4. Name three ways to prepare yourself to take positions on issues.

- a. **Keep information updated.**
 - b. **Form well-reasoned opinions.**
 - c. **Be ready to promote or defend them.**
 - d. Read the newspaper.
 - e. Watch serious TV programs. (Page 2-7)
-

5. Give two reasons why astute decision makers issue broad guidance when assigning a task.

- a. It enables them to issue detailed instructions.
- b. **They avoid micro-managing.**
- c. **They can focus on larger issues.**
- d. They can stay fully involved in the task.

(Page 2-9) *Choices a and d are incorrect. Decision makers issue guidance to avoid detailed instructions and full involvement.*

Continued on next page

Lesson 2--Answer Key and Feedback, Continued

6. *Perspective* is a vital attribute for an action officer, because it--

- a. Gives one a feel for the problem.
- b. Makes it easier to shape information.
- c. Helps one to find the solution.

(Page 2-11) *One who lacks perspective lives in a world of parochial views and immature solutions.*

7. Information should be condensed to--

- a. Determine its significance.
- b. Make it quickly retrievable.
- c. Determine its reliability.
- d. Format it for rapid update.

(Page 2-13) *Choice a is incorrect. Information should be analyzed for its significance before it's condensed.*

8. Situation: Your boss isn't eager to read your papers. However, your peers quickly get their papers approved by simply discussing them with the boss. What could be the problem?

- a. You are probably not providing enough information.
- b. **Your boss evidently is a *listener*, who prefers to process information orally.**
- c. You are probably providing too much information.
- d. Your boss is evidently a reader, who prefers to process information visually.

(Page 2-15) *Your present approach would be better suited for a boss who's a reader and prefers to study the issue in depth before discussing it. Consider switching your approach.*

9. Identify standards for completed staff work.

- a. Should be perfect.
- b. Requires unanimous agreement.
- c. Should always be submitted in final form.
- d. **Should be acceptable, in view of resource constraints.**

(Page 2-18) *Choices a, b, and c are incorrect:*

- *It doesn't have to be perfect--just acceptable.*
 - *May not be appropriate to submit action in final form--a draft that just needs fine tuning may be OK at times.*
 - *Doesn't require unanimous agreement--rarely will all agree.*
-

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