For the BESA Webinar held on Friday 17th April, I offered some thoughts on the following questions:

1) why are the armed forces so good at planning and delivery?
and

2) how to survive a lockdown? (a submariner’s view)

Following this presentation, David Frise asked me to provide a summarised overview of the principles and process of military planning for you to consider when reflecting on your own processes and techniques. My focus will be on how the military process works. Notes on preparation, delivery and the lockdown will be coming up next.

PLANNING
The military have a consistent planning procedure and a clear doctrine by which they operate. In the Army Field Manual 5, “Military Doctrine is defined as a set of fundamental principles by which military forces guide their actions in support of objectives.” All members of the armed forces understand this process of military planning and the continuity it offers junior and senior personnel in carrying out their roles. This familiarity helps thinking and planning to be undertaken quickly, allowing innovation and initiative their place in the planning process.

A plan determines the senior managers initial balance of effort within a framework of time, resources and delegated authority. In this respect, it is the same approach whether on a battlefield or a construction site. Flexible and pragmatic plans are more likely to work than those which are overly rigid. A plan is a top down led device; it requires the early and focused attention of the commander/manager. The senior manager must impart her/his intent to the planning team. Intent, as defined in the Army Field Manual 5, “is a concise and precise statement of what the manager intends to do and why, expressed as effects to be created.” It is as brief as possible and easy to remember, so that subordinates can know it. It is formulated by the commander/manager alone. The intent should be less than a page and reflect the culture, values and vision of your organisation. If it seems difficult, time consuming and personal, it is, and it should be.

The Planning Process (somewhat simplified):

Defining the task: knowing and understanding the aims, objectives and purpose of the task. Framing the issues, within the operational context as well as appreciating the policy (e.g. building regulations) and objectives from higher authority; 1 and 2 up senior managers.
Planning: the process of leading the team in the creation and development of a plan of action. Here the level of complexity of the task can be broken down by looking at different courses of action, setting priorities and decision points.

Briefing: communicating the plan – being clear and concise. Then briefing the plan daily or more often if events are moving at pace. However, be careful the preparation of briefings doesn’t become an end in itself. The military call the briefing plan the ‘Battle Rhythm’. Success in briefing is when you ask a junior or inexperienced member of the team what the objectives are and they know what their role is. If they don’t know, then the system is not working and may point to other aspects of planning that may be wrong or inefficient.

Assessment: is there monitoring and evaluation of the changing commercial issues, time available and operational background? A good assessment requires good situational awareness. This will indicate whether the plan needs alteration or decisions need to be reviewed. Assessment is important in all the phases of a project or military operation. It is also a continuous method of making sure the managerial team are all on the same page and sets up a collaborative approach that builds a unity of effort. It is a vital supporting activity which can include questioning the plan or challenging the approach.

A plan’s success is normally contingent upon the defined task being achieved. However, it is possible to have a good plan and still fail if the opposition (for example, corona virus) stops your progress, your equipment or processes fail (for example if the NHS was unable to meet the care demand) or you are unable to adapt to changing circumstances rapidly and with confidence (nursing homes, testing and PPE). This requires the understanding and management of the operational (planned activity) and resource (people, kit and finance) risks that adversely affect required outcomes. Risk measures the impact of a problem and likelihood of it happening and it may require the plan to have pre-worked contingencies if a risk turns into a reality. Don’t hide away from what is happening on the ground; the truth is always found on the shop floor.

I hope that this will help you appreciate the planning processes that enabled the fabrication of a field hospital in East London in 9 days. Work to create the conditions for operational (or commercial) success starts long before construction begins.

If you have any questions or are interested in following up on these ideas, please get in touch.