

Setting Conditions for Success: Seven Simple Rules for New Staff Officers

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Far and away the best prize that life has to offer is the chance to work hard at work worth doing.
—Theodore Roosevelt²

Introduction

In my article *Azimuth, Distance and Checkpoints: Thoughts on Leadership, Professionalism, and Soldiering for Judge Advocates (JAs)*, I offered ten simple rules designed to help new JAs become better leaders.³ This article follows the same general format, offering seven rules with accompanying thoughts and suggestions to help new JAs become more effective staff officers.

The information presented in this article is not doctrine nor is it revolutionary. If you have served as a staff officer for any length of time, you probably have already learned many of these lessons. As with the *Azimuth* article, my intent is to share lessons learned with fellow Soldiers. I hope the ideas and information in this article are helpful and that they make your life as a staff officer and a military professional a little bit easier.

Seven Simple Rules for Staff Officers

Rule #1: Understand, and Be Proud of, Your Role as a Staff Officer

While there are a number of important leadership positions in the Judge Advocate General's Corps (JAGC), there are only three genuine *command* billets for active duty JAs.⁴ Thus, as a JA, you will likely spend your entire career as a staff officer.⁵ Because of this, it is essential that you approach your duties from the right premise: *there is nothing wrong with being a staff officer.*

This notion is not easy for everyone to accept. Indeed, some staff officers seem almost apologetic about being a part of the Army.⁶ To some extent, this attitude is understandable. Most Soldiers prefer to be where the action is, and military culture is rife with jokes and derisive comments about “pencil pushers” and “staff weenies.” While this attitude may be prevalent, that does not mean you have to buy into it. Like every Soldier, you play an important role in the success of the Army. No matter what you do, your position is unique; a position that can only be filled by someone with your particular mix of training, education, and experience. Your work as a staff officer sets conditions for the ultimate success of the organization. Be proud of your role, and never apologize to anyone for the special expertise you bring to the fight.

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² Theodore Roosevelt, Speech at Syracuse, New York (Sept. 7, 1903), available at <http://kenfran.tripod.com/teddy.htm>.

³ Lieutenant Colonel Mike Ryan, *Azimuth, Distance, and Checkpoints: Thoughts on Leadership, Professionalism, and Soldiering*, ARMY LAW., Aug. 2005, at 40.

⁴ Command billets for active duty JAs include the following: Commander, U.S. Army Legal Services Agency; Commander, U.S. Army Claims Service; and Commander, The Judge Advocate General's Legal Center and School.

⁵ Even so-called “line” officers will spend the majority of their careers as staff officers. For example, a combat arms officer will be lucky if, during a twenty-year career, he spends a year as a platoon leader, two years as a company commander, and two years as a battalion commander. Only a select few officers will serve as Brigade Commanders; fewer still will be promoted beyond the rank of colonel and serve in command billets as general officers.

⁶ As the Senior Observer/Controller at The Joint Readiness Training Center from 2000 through 2003, I directly observed JAs during twenty-one rotational exercises. A number of these officers were relatively new to the Army and many seemed markedly uncomfortable with their role as the lawyer on the battle staff. Often, their unease manifested itself in various forms of self-deprecation.

Rule #2: Be Brief, Be Brilliant, Be Gone

To be an effective staff officer, you must understand that you are one of several people whose job it is to present information to the commander and other key decision-makers each day. It is imperative, therefore, that you learn to say what you need to say—both in writing and in person—in as succinct a manner as possible. There is an old Army adage that says, to be a successful staff officer, you must learn to do three things: *be brief, be brilliant, and be gone*.

This concept is sometimes difficult for JAs—especially those who recently graduated from law school. From the outset, law students are told by professors that the student’s conclusions are rarely important. What matters on a law school test is the student’s ability to spot issues and to explain (often in great detail) how they arrived at their conclusions. It is no surprise then that when asked to prepare written products, many new JAs write lengthy dissertations discussing not only the applicable law, but also the litany of potential issues involved in the matter. Likewise, because they have been trained to be zealous oral advocates, new JAs can sometimes turn simple oral briefs into prolonged oral arguments.

If you are a new JA, try to guard against these tendencies. When preparing briefings or written products, remind yourself to be direct. Identify the specific issue or problem you have been asked to address, briefly discuss the facts or law bearing on the problem, and give a recommendation. If you are preparing a formal, written product, comply with relevant provisions of *Army Regulation (AR) 25-50*.⁷ If the person you prepared the product for is forced to focus on the minutia of spacing and punctuation, he cannot concentrate on the substantive content of your product.

Whether you are presenting a briefing or drafting a written review, keep it short and simple. To cut to the heart of the matter, many staff officers find it useful to follow the *bottom line up front* (BLUF) methodology.⁸ Commanders and supervisors are busy people. Most have neither the time nor the inclination to read or listen to a detailed discussion of issues. Be prepared to discuss how you reached your conclusions, but do not go into detail unless you are asked to do so. As a staff officer, your job is to provide the commander with the information necessary for him to make a decision. Providing information in a straightforward and efficient manner will best assist the commander or supervisor whom you are advising.

Rule #3: Develop and Follow a Standard Briefing Methodology

Briefings are the stock-in-trade of the staff officer. At the risk of overstating the obvious, when presenting a briefing, be brief! Your task is not to impress your listeners with your oratory skills—it is to present them with information that either enhances their understanding of a situation (an information briefing) or allows them to make an informed decision (a decision briefing).⁹ To be brief and brilliant, you should develop and follow a simple briefing methodology—a format for presenting the material and a set of guidelines to which you adhere when presenting the briefing.

There are numerous sources that provide briefing formats.¹⁰ Some organizations also have their own formats. The suggestions in the following section are by no means the official school solution; rather, they are simply tactics and techniques that have proven successful for me in a variety of situations.

Suggested Briefing Format

Briefing Purpose

Begin with an introduction stating the purpose of the briefing. For example, “Good Morning, Sir, this is an information briefing. The purpose is to provide you with information regarding . . .” or “Good afternoon, Ma’am, this is a decision brief. I will present you with recommended courses of action (COAs), and at the end of the brief, I will ask you to choose one.”

⁷ U.S. DEP’T OF ARMY, REG. 25-50, PREPARING AND MANAGING CORRESPONDENCE (3 June 2002).

⁸ When using this approach, the briefer or author lists the essential conclusion in one short sentence in the first part of a briefing or as the initial line of a written product.

⁹ U.S. DEP’T OF ARMY, FIELD MANUAL 101-5, STAFF ORGANIZATION AND OPERATIONS APP. E (31 May 1997).

¹⁰ For the best official source for Army officers, see U.S. DEP’T OF ARMY, FIELD MANUAL 5-0, ARMY PLANNING AND ORDERS PRODUCTION app. B (Jan. 2005).

Background and Context

After your introduction, provide some background or context to the brief. Such background or context may include a chronology of the events that precipitated the briefing or a restatement of the original tasking.

Relevant Information

Consider this the body of the brief—where you discuss the details of the issue, problem, or situation at hand. Your discussion should be framed with a view toward your ultimate purpose—*informing the listener or helping him make a decision*. In a decision brief, you should discuss proposed COAs for solving the problem. The key to this section is to stay focused on *only* those things that the person you are briefing needs to know.

Recommendations and the Way Ahead

After presenting the relevant information, bring the brief to a close. If it is a decision brief, then you should offer recommendations. If you have presented various COAs, then recommend the one you think is best and explain why. If you presented your COAs in order of preference, then list a few of the pros and cons of each COA. Explaining *why* you are recommending a certain COA is the most important part of the briefing. Whether you are presenting a decision or an information brief, you should outline the way ahead by listing upcoming events, milestones, or activities that directly affect the issue you just briefed.

Conclusion and Questions

Always end your briefing with a short conclusory statement, such as “Subject to your questions or guidance, Sir, this concludes my brief.” This will be a clear signal to your listener that you are finished. It will also provide the listener an opportunity to ask questions, make decisions, and offer guidance.

Review Guidance, Directions, or Due-Outs

Once the person you are briefing has made a decision or issued guidance, make sure you conduct a quick review while he is still present. It only takes a moment, and it may save you hours of wasted time. You do not need to rehash the briefing—simply review your notes and restate the decision or guidance you received: “To recap, Sir, here is what I understand you want me to do. . . .”

Miscellaneous Briefing Tips

Practice Your Briefing Out Loud

Always practice important briefings out loud before presenting them. Practicing will give you a feel for how long the briefing will take and help you get comfortable with your material. Similarly, when possible you should watch experienced staff officers brief and learn from their techniques.

Know Your Briefing Material

No matter who you are briefing, never try to wing it. Along the same lines, never tap dance when confronted with a tough question. If you don't know the answer, then tell the questioner that you will research the issue and provide him an answer later.

Number Your Slides

This simple tip will help you immensely. When your slides are numbered it is much easier to focus the listener and guide him through the brief. Most importantly, numbered slides help you get back on track after questions or digressions.

Never Read Slides Verbatim

Rather than reading directly from your slides, determine in advance one or two key points or takeaways from each slide. As you brief, direct the listener's attention to the slide number and state your point accordingly. For example, "Sir, slide number 6 shows you key facts bearing on the problem; the important point here is. . ."

Put Detailed Information in Back-Up Slides

Do not overwhelm your listener with too much information. Unless they are absolutely necessary, place charts, numbers, spreadsheets, or similar information in back-up slides at the end of the briefing. If necessary, the person you are briefing can look at the back-up slides later. If questions arise during the briefing, then you can direct the questioner to the appropriate back-up slides.

Interact with Your Listener

Being a military professional does not require you to be an automaton. Whether you are briefing a lieutenant colonel or a lieutenant general, be yourself and interact with your listener. Try to relax, look your listener in the eye, and speak in simple terms. You can even smile when appropriate. A word of caution; however, is to never get cute. Trying to be funny during a briefing is rarely, if ever, a good idea.

Rule #4: Coordinate and Synchronize Your Efforts with Other Staff Sections

A staff is a team. The team's goal is mission success. Accordingly, everything you do as a staff officer should be directed toward the success of the team *as a whole*. Failing to coordinate your efforts with your teammates is not only counterproductive; it is a breach of military protocol. It is, therefore, absolutely imperative that you learn to properly synchronize your efforts with the efforts of the other staff sections.

How do you do this? The first step for new JAs is to learn what the other staff sections do. Your supervisor and your more experienced co-workers can help you with this; however, the best way to learn their missions is to visit the other staff sections and talk to the people who work there. Ask people in these sections to explain to you what they do and how their section contributes to the organization's mission. You might be surprised by how enthusiastic most people are when it comes to talking about their work. With your supervisor's and your co-workers' help and through personal relationships you build with people from other staff sections, it will not be long before you develop a good sense of what actions need to be coordinated with the personnel assigned to the various staff sections within your particular organization.

As a general rule, when in doubt; coordinate. If the appropriate individuals in the other staff sections have no comment or no input relevant for your action, they will concur and move on. Conversely, if you *fail* to coordinate an action that is in another staff section's lane, then you are guaranteed to ruffle feathers and create bad will.

On this subject, another good rule of thumb is to never depend solely on e-mail to coordinate important actions unless it is absolutely unavoidable. Hitting the send button does not mean an action is coordinated or completed. One of the commanders for whom I worked had a list of ten commandments for the Regiment. Among the ten commandments was to never assume e-mail is read. This commandment is a key point for staff officers to remember. Keep in mind that, in most cases, "I sent an e-mail" is not an appropriate response when you are asked for the status of an action. As was mentioned above, if you are working an action or a project that requires input or participation from others, take the time to talk to them face-to-face or, at a minimum, by telephone. This practice not only makes for a better work product; it helps build better working relationships with your teammates in the long run.

Rule #5: Do Not Bring a Decision-Maker a Problem Without a Proposed Solution

It is the responsibility of your supervisor, your commander, and other key leaders to offer guidance and direction to the organization. In large measure, they will do this by resolving problems and making decisions. To facilitate this process, try not to bring your decision-maker a problem without also providing a recommended solution.

This rule is particularly important for JAs. As discussed in rule number one, lawyers are formally trained to spot issues and identify problems. As staff officers, however, we must learn to take the extra step of offering proposed solutions to the issues or problems we spot. It does no good, for example, to simply tell the commander that an action is illegal or contrary to regulations. What he needs to know is whether there is a way to legally, morally, and ethically accomplish his goal or to get to “yes.” If not, he needs to know if there are other acceptable alternative courses of action. In short, no matter how big or how small the problem, the ethics and ethos of the military profession demand that an officer do more than simply identify the problem. You owe it to your leaders to—as the saying goes—“be part of the solution.” Finally, before proposing a solution, make sure you adhere to rule number 4. Whatever course of action you recommend, ensure it has been coordinated in advance with the appropriate staff section(s).

Your responsibility does not end when your recommended solution is adopted. When the leadership of your organization decides to pursue a course of action that you have recommended, it is incumbent upon you to monitor the situation and ensure the details are implemented in accordance with the decision maker’s intent. If the solution involves a long-term project, then you should plan on providing periodic updates (often called *in progress reviews* or IPRs) that outline the project’s progress. When IPRs will be necessary, make sure your proposed solution includes a proposed IPR schedule.

Rule #6: Attitude Is Everything

Staff work can sometimes be frustrating. There will be times when you work diligently on a briefing or project, only to have it cancelled at the last minute. You may work for a supervisor who gives you vague guidance or who is constantly changing the organization’s focus. Last minute projects, “hot” missions, and short suspense dates are all part of the day-to-day life of a staff officer. As elementary as it may sound, the best way to deal with these frustrations is to keep a positive outlook. For the staff officer, attitude is everything.

Maintaining a positive outlook starts with remaining flexible. Change is an immutable characteristic of staff work, and you will be much happier if you accept and embrace this fact. Second, try not to become too emotionally attached to projects. While your work is important, it should never determine your attitude about life; nor should it negatively affect your relationships with your co-workers. If you get upset or take things personally when a superior makes changes or gives you a new priority, then you are destined to be unhappy at work.

More often than not, people get angry or upset about work-related issues when they invest ego and emotion in their work. If you see yourself headed in this direction, then consider the following advice of the former Chairman of the Joint Chiefs of Staff, General Colin Powell: “Avoid having your ego so close to your position that, when your position falls, your ego goes with it.”¹¹ Finally, keep your sense of humor. Humor is a critical “safety valve” in stressful situations, and the ability to laugh at things, especially yourself, is a key component of a positive attitude.

Rule #7: Pay Attention to Detail

The last rule is simple, but critically important: pay attention to detail. As a staff officer, this concept must be your lodestar. By its very nature, staff work is detail oriented, and making sure the i’s are dotted and the t’s are crossed is one of the things you get paid to do as a staff officer. It is not glamorous, but it is undeniably necessary. The commander and other important decision-makers that you work for will be counting on you to attend to the small details so that they can make the big decisions.

Does this mean you should expect to be perfect? Certainly not. Everyone makes mistakes; you will, too. Rather than striving for perfection, your goal should be to minimize your mistakes by committing yourself to paying attention to detail. Small mistakes such as spelling or typographical errors in written products or briefing slides may seem like no big deal, but, when repeated often enough, they will damage your professional credibility. Similarly, it is extremely embarrassing when your supervisor finds a mistake in correspondence you have prepared for his signature.

While these kinds of mistakes are awkward when they happen to you personally, their effects are magnified manifold when they put your commander or your supervisor in a bad position. If you are preparing products for someone else’s signature or materials they will use to brief, then pay extremely close attention to their contents. Never set your superiors up for failure or embarrassment by providing them with products that contain mistakes or inaccuracies.

¹¹ COLIN POWELL, MY AMERICAN JOURNEY 614 (2003).

There are a variety of techniques to help you avoid most mistakes: always have someone else proofread important products; if it is a high-profile project, have two or three people look it over. Use your computer's spelling and grammar check features. Some even find it helpful to read key documents or important briefing slides out loud to ensure they make sense. If you are dealing with numbers and arithmetic, then use a calculator. Finally, if you routinely use certain computer programs, such as (Excel or PowerPoint), for your job, take the time to learn their capabilities. All the jokes about "Powerpoint Rangers" aside, the truth is you can be more effective to your organization and, ultimately, can contribute more to mission accomplishment when you are able to create and present accurate, professional-looking products that clearly communicate important ideas and concepts.

Conclusion

Every Soldier has a job to do. As a staff officer, yours is to use your intelligence and initiative, coupled with your unique mix of education, training, and experience to help your organization succeed. Be proud of your role, and approach your duties as a staff officer with a positive, professional attitude. If you do, you will help set conditions for the success of your organization and ultimately, for the success of the Army as a whole.