

# Unit Training Management — A Primer for Company Leaders

By: Don Gomez and Joshua Peterson

As we enter the new fiscal year amid a continuing global pandemic, Company-level leaders across the Army are building training plans to prepare their units for their wartime missions. To guide leaders through this process, the Army has

**reformed and revitalized** its Unit Training Management (UTM) program. Junior leaders across the Army have rich and deep experience participating in training events and in many cases designing, executing, and assessing them. The Army's UTM philosophy capitalizes on that experience while ensuring that training conducted is both tied to a unit's Mission Essential Tasks (METs) and assessed in accordance with standards for training proficiency.<sup>[i]</sup>



Last year, we served as a Company Command team of a Psychological Operations Headquarters and Support Company in a “Regional” Psychological Operations Battalion aligned to the Central Command area of responsibility – an extremely niche unit.<sup>[ii]</sup> As a new Company Commander with a background mostly in infantry units and a First Sergeant with similar experiences, we faced a steep learning curve in understanding what UTM is, why it matters, and how to implement it. Together, we educated ourselves on the program, attended training when possible, met with subject matter experts at TRADOC to build understanding, and engaged in self-development by devouring all that we could on the subject. As a result, we developed a Unit Training Plan (UTP) that included valuable input from junior and senior leaders within the Company, trained against our METs, and were objectively assessed in accordance with the current training and evaluation outlines (TE&O).

There are plenty of official (ADP 7.0) and unofficial sources to turn to in designing a UTP – the ultimate output of implementing UTM. Most of these resources can be found on the Army Training Network's (ATN) **Unit Training Management** page. Our goal with this primer is to allow Company-level leaders to use this as a roadmap and begin planning. While not discussed in detail here, it is critical that leaders understand the Digital Training Management System (DTMS) to effectively implement and enable UTM. DTMS is the program-of-record that is used to guide, track, and report individual and collective training and is a key part of UTM.

## **Step 1. Analysis**

*Input: CO/1SG Analysis*

*Output: CO/1SG Initial planning guidance*

The first step is gathering relevant information about your unit. This is largely a fact-finding mission led by the CO/1SG to develop initial guidance to be used in the Unit Planning Conference (UPC). To aid in gathering this information, you should be asking these questions:

### **1. What is your Company's Mission Essential Task List (METL)?**

This is the most important question and the best place to start. Most units have a standard, HQDA-assigned METL (accessible through DTMS). At times, these may be under review or revision. Often, it is helpful to look at similar units to see how their METL is different or related – especially if your unit does not currently have a HQDA standard METL. It is important to remember that echelons below the Company do not have METs.

### **2. Has the Battalion published annual training guidance? They should be, but if they haven't, has their higher published training guidance? These documents should be nested, and even though they are published as guidance, the way that your unit is supposed to train may be deliberately specified (ours had specific guidance regarding frequency of Field Training Exercises and Special Operations-specific requirements for low-density soldiers).**

### **3. Does your unit have an upcoming deployment or Combat Training Center (CTC) rotation? If the answer is yes, your training is likely to be modified to account for this and you will need to adjust. For example, you may be deploying to perform a mission**

that is not part of your METL. It is your responsibility (as CO/1SG) to ensure that you design effective, prioritized training that will prepare the unit to execute that mission.

- 4. What is your higher Commander's vision for your unit and how it fits into the bigger picture?** Leaders tend to have a vision for the development and glidepath of their unit, but this may conflict with what your boss wants. This can often be solved with a simple, short conversation. We pitched our vision of the Company to our Battalion Commander and Command Sergeant Major, and they agreed, adding refinements. Once you and the higher Command Team have a shared understanding of your unit, its mission, and the way forward, the path opens to begin designing a plan to achieve the unit's objectives.

## **Step 2. The Unit Planning Conference**

*Input: CO/1SG Initial planning guidance*

*Output: Unit training goals, objectives, and ideas*

The Unit Planning Conference (UPC) is a Company-level meeting that includes the Commander, First Sergeant, and key leaders from throughout the Company. Its purpose is to build a shared understanding of the unit's mission with a goal of developing the Unit Training Plan (UTP). In our experience, the most important part of this step is building enthusiasm among junior leaders for the unit's mission and ownership of their role in developing and executing the UTP. The UTP will become the guiding document to drive training for the next year, thus, it is important to include contributions from junior leaders throughout the Company. Our unit required significant input from Company leaders because of the disparate missions and tasks being conducted by different sections and job specialties. It is the Commander and First Sergeant's duty to guide the conference, not dictate it. Introducing the METL and higher Commander's Intent and getting that on a screen or white board is a great place to start. Then, it is important to guide a discussion to build a shared understanding of the unit's mission and vision. Section/platoon leaders should understand the bigger picture and where their platoon/section fits in.

Identifying "big hairy audacious goals" (BHAGs) linked to the most challenging METs helps drive a reverse planning process.<sup>[iii]</sup> We decided that we would conduct a section/platoon level defensive live-

fire exercise that would require significant additional training. Placing that BHAG at the end of the training year, we could now identify the types of training events that would need to occur in the interim to get there. We did not overthink this. As a group, we collectively knew from experience that this would require basic rifle marksmanship ranges, individual movement technique training, classes on conducting the defense, machine gun ranges, and more. We identified dozens of training events – both large and small – and wrote them down on the white board. Broadly speaking, these became the units training goals, objectives, and ideas.

Most importantly, we needed to ensure that we deliberately trained against our Company's METL. To accomplish this, we decided on quarterly Field Training Exercises (FTXs) to train against those tasks.

The UPC can be an exciting, freewheeling brainstorming session that does not reject anything up front but encourages creativity and innovation. Getting "buy-in" from junior leaders is paramount as they will make or break the training experience. Critical in this process was habitually checking in with the First Sergeant and other experienced Non-Commissioned Officers for a "sanity check" to ensure that good ideas do not become unrealistic. At the conclusion of the UPC, the Commander and First Sergeant should have a general idea of what needs to happen over the next year.

### **Step 3. Build the Unit Training Plan**

*Input: Unit training goals, objectives, and ideas*

*Output: Unit Training Plan*

With the unit's training goals, objectives, and ideas developed during the UPC, it is the Commander and First Sergeant's responsibility to physically write and publish the UTP. We did not belabor this – it is more important to develop a good UPC rapidly than to create a perfect UPC later. We used the template provided by the [Army Training Management team](#) and populated the UTP with our data and vision. The UTP should specify exactly what the Company is going to do to train for its mission. It should also provide space for section/platoon level leaders to design their own training in accordance with the plan. In our case, to train the Company against the Company METL, we based our UTP around quarterly FTXs, with Company-level ranges interspersed, rotating weapons systems to ensure familiarity, comfort,

and proficiency across the formation. We did not know exactly what day these events would take place, but we had a general idea (which month/quarter) and took our best guess to provide junior leaders and families an idea of when we may be in in the field.

Once the draft UTP is complete, it is important to have it reviewed by the Battalion Operations Officer and Sergeant Major (S3 OIC/NCOIC) for another sanity check, to ensure it meets the Commander's intent, and that it does not conflict with higher level command events. It is likely that the S3 has a better and more nuanced sense for of the Commander's vision than the Company Command Team.

We found it useful to build a **simple graphic** that captures the UTP in the form of a "glidepath" to serve as an aid during training meetings or when discussing the UTP with external audiences. There is no substitute for the formal UTP, and when discussing training, the glidepath served as "a way" to direct attention to the detailed portions of the UTP as required.

Finally, once the UTP is complete and has approval from higher, it should be published to the Company as soon as possible.



*One of the challenges of the UTP is recognizing that it is just that – a plan – and will undoubtedly change. Missions will change, personnel will swap out, and new emergencies will throw the plan off course. If done correctly, though, the UTP provides flexibility and the ability to adjust over the course of the year to meet new demands. Most of the individual training events will not receive the planning attention they need until within the 8 weeks leading to execution.*

#### **Step 4. Design the training events in the UTP**

*Input: Unit Training Plan*

*Output: Training events build into DTMS*

With the UTP published, now comes the real work of designing the training events. We focused our planning effort on the collective

training events that trained against our METL. Our understanding of the unit's mission, initial unit assessment, and the shared vision for the Company serves as the starting point for training event design. In our case, deploying the Headquarters Company to the field, establish a Psychological Operations Tactical Operations Center (TOC) would always serve as the nucleus of field training. Simply moving disparate sections of a Headquarters Company and establishing a TOC can be a significant challenge with lots of opportunities for leadership.

In training design, we addressed one training event at a time, always trying to publish the WARNO no less than 8 weeks out from execution. Additionally, we strived to establish event "team leads" to own the development and execution of the training with guidance from the CO/1SG. This was normally an officer and NCO team from the same section/platoon. This provides opportunities for junior leaders to contribute to Company-level training events and assists with their self-development. For collective training events at the Company-level that trained against a MET, we opted to "own" the training at the CDR/1SG level.

When designing MET-based training events, we followed Army Training Methodology, bringing together Company leaders to discuss the training.<sup>[iv]</sup> We provided the participants with a simple concept sketch that included the MET we are training against, its updated T&EO, a draft mission statement, Commander's Intent to include key tasks, and endstate. The goal of this this discussion was developing the "Battle Tasks" of each subordinate section by phase.<sup>[v]</sup> Section/platoon leadership developed their own Battle Tasks based on their understanding of the mission and their section/platoon's role in accomplishing it and then submitted them to the CO/1SG for approval. Once approved, they must be integrated into the training event. This process leverages the experience and job expertise of junior leaders and results in a more robust training event.

Once the concept of an event is complete, it should be built into DTMS as fully as possible. This provides visibility to all leaders in the organization. Depending on the size/scale of the training event, it may require additional meetings or planning conferences prior to publishing formal orders.



*Resources – Land and Ammo: The process for reserving land and ammunition varies from post to post, but we recommend leaning forward in this process as much as possible. In our case, we made our reservations immediately upon completing the Unit Planning Conference when we templated out the dates for training. Actual training dates will depend more on land and ammunition availability than the desires of the Company Command Team. We have seen numerous well-planned training events never executed because the land and ammunition were requested too late or not at all.*

### **Step 5. Follow Up and Assist**

*Input: Training events built into DTMS*

*Output: Orders*

With a mission statement, commander's intent, a MET to train against, and a collection of section/platoon-level Battle Tasks, the ingredients are present to start publishing formal orders. We made it clear with our leaders during the initial training conference for an event (often more than 10 weeks out) that this meeting would serve as the WARNO. We would then publish a formal WARNO/OPORD/FRAGOs leading up to the event as required.

In our Company, upcoming field exercises became the background hum to normal operations. The upcoming training provided a focus for section/platoon level leaders to design their own training to prepare for the collective event, best executed during Sergeant's Time Training. During normal circulation throughout the Company, we made it a point to deliberately talk about upcoming training with junior soldiers to confirm that accurate information was making it down to the lowest level.

As the training events approached, we increased the number of short "azimuth checks" with Company leaders to ensure we were still on the right path. To the fullest extent possible, we worked to empower junior leaders to own portions of the training exercise, like Company rehearsals or the movement plan, for example. This both distributes

the planning of the training event and builds a shared responsibility for its successful execution.

## **Step 6. Execute!**

*Input: Orders*

*Output: Training assessment/evaluation*

On the day of execution, the most important thing to remember is that much of the planning done in preparation for the training will begin to crumble. There will inevitably be issues, timelines will bust, and things will go wrong. This is all part of the training and as the CO/1SG it is important to communicate this expectation to both junior leaders and soldiers. The planning process *is* training and executing the plan – and adapting to changing conditions – is a critical and realistic opportunity to develop true leadership. Some soldiers will view any deviation from the plan as a sign of failure. The CO/1SG must emphasize that adjusting the plan with a focus accomplishing the unit's mission and achieving the Commander's Intent is an important part of the training.

As much as possible, it is important to be physically present for the training, especially the most critical aspects, without being overbearing or taking over. Leadership presence sends a strong signal. For this reason, it is also important to invite leaders at a higher echelon to participate in or observe the training. This is not too show off – but to provide a venue for senior leaders to impart their guidance and give them an opportunity to interact with junior soldiers. The schedules of Battalion and Brigade/Regimental leaders are jam-packed and they will often welcome the opportunity to participate in training.

Additionally, there is an added pressure to perform when senior leaders are present. Of course, it is important to avoid simply putting on a “dog and pony show” when senior leaders are present, and it takes humility and trust to allow training to proceed – and potentially fail – without making unnecessary adjustments simply to please a senior leader. In fact, failures in view of senior leaders can provide important learning opportunities, and often lead to avoiding similar mistakes in the future.

Lastly, in executing the training, it is incredibly important to stay out of the way and let junior leaders lead. The Commander and First Sergeant's role up until this point has been guiding the planning process towards execution. Taking direct control of every event or

interjecting every wise thought erodes trust and eliminates opportunities for junior leaders to learn – often through failing. If done correctly, the Commander and First Sergeant are most valuable in guiding the After Action Review process, providing advice and comment when sought, and interjecting for the sake of safety or to avoid catastrophic damage to Army property.



*Training and Evaluation Outline (T&EO). It is critical that the Company-level training events that train against a Mission Essential Task (MET) use the most current T&EO. This does not need to be overly complicated or formal. During our first FTX, we printed out the T&EO for one of our METs and went down the list during the exercise and provided as honest an assessment as we could. During future FTXs, we coordinated with other units to provide external evaluators, who shadowed the unit and provided a more objective assessment from which to derive our training evaluation in accordance with Army doctrine.*

### **Plan. Execute. Repeat.**

Implementing Unit Training Management and deliberately working through the process as prescribed was at times tedious and difficult. Navigating different Army programs to gather information (DTMS, ATN, CATS, etc.), reviewing historical unit data, and then cross-walking this with Commanders, Command Sergeants Majors, and junior leaders within the unit felt like an ever-expanding uphill battle. We often found guidance and information conflicting due to outdated documents or uncertain deployment schedules. Still, toiling through the hard work of understanding the mission and the vision of the unit and building a deliberate UTP to match ultimately made the work of planning and executing training easier. The UTP creates a semblance of control and a way forward for a unit. It also provides a clear reference point for junior leaders to devise their training. Importantly, the UTP can be handed off between leaders as they change-out without disrupting the unit's glidepath.

Once integrated at the Company-level, UTM should be made routine. The UTP should be continually reviewed and time should be budgeted for the next UPC to build the next UTP. This iterative process results in continued refinement, and ultimately can bring a unit within alignment of the Army's mission of building sustainable readiness, and soldiers and units that are ready to "fight tonight."

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*Captain Don Gomez is a Psychological Operations officer currently assigned as an Instructor of Arabic at the United States Military Academy at West Point. His previous assignment was Commander, HSC/8th Psychological Operations Battalion (Airborne).*

*Master Sergeant Joshua Peterson is a Psychological Operations Non-Commissioned Officer currently assigned as the Senior Enlisted Advisor to Information Warfare Task Force – Afghanistan. His previous assignment was First Sergeant, HSC/8th Psychological Operations Battalion (Airborne).*

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[i] Army FRAGO 6 renamed objective assessment of training proficiency – commonly referred to as "Objective T" – to standards for training proficiency.

[ii] Our HQ company had more than 10 different Military Occupational Specialties, each with unique training requirements.

[iii] "Big Hairy Audacious Goals" is a concept we pulled from the book *Taking the Guidon: Exceptional Leadership at the Company Level*, which was in turn borrowed from Jim Collins, author of *Good to Great*.

[iv] The Unit Training Management (UTM) website provides updated and in-depth training slides to assist in this process. We found the "Plan a Training Event" slide deck extremely helpful in focusing our efforts to ensure that our training time was maximized.

[v] "Battle Tasks" are those platoon/section tasks that support the Company MET. They are developed by junior leaders and submitted to the CO/1SG for approval.

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