Unit Training Management (UTM) is the process Army commanders, leaders and staffs use to plan-prepare-execute-assess unit training and identify the resources needed to accomplish that training. This manual is the extension of the Army’s training doctrine as described in ADP 7-0 (Training Units and Developing Leaders) and ADRP 7-0 (Training Units and Developing Leaders). The concepts and processes in this manual are applicable to the Active Army, Army National Guard/Army National Guard of the United States, and United States Army Reserve unless otherwise indicated. It supersedes the Unit Training Management (UTM) manual dated August 2012.
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Foreword

In August 2012, the Unit Training Management (UTM) manual on ATN was updated to coincide with the release of ADP 7-0 and ADRP 7-0. Shortly thereafter, the CSA directed the authors to visit the major Army installations and teach training management to the field while engaging the institutions to update their instruction. During that year, the team learned as much from the field as the field learned from them. This revision of UTM is the product of those lessons learned to provide you with the information you need to construct a complete training plan for your unit and provide your subordinates with specific tasks and standards so they can accomplish what you want; quality training with measurable performance.

The intent of the handbook is to provide not only a web-based, searchable version, but also one that leaders can download in hard copy.

We thank the officers and NCOs who attended the training for their insight and ideas.

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Introduction

The Leader’s Guide to Unit Training Management (UTM) expands on the training foundations and tenets found in Army Doctrine Publication (ADP) 7-0 and Army Doctrine Reference Publication (ADRP) 7-0. UTM provides expanded details, concepts and examples of the content of both doctrinal manuals. UTM is also supported by the Army Training Network (ATN), the Digital Training Management System (DTMS) and the Combined Arms Training Strategies (CATS). Each of these web-based systems falls under the Army Training Management System (ATMS), and can be accessed through ATN at https://atn.army.mil.

UTM contains 5 chapters and appendices A-H. Each section contains sufficient redundancy with other sections of the guide to allow each section to stand alone, without having to refer to the rest of the manual. In time, as Army leaders become comfortable again with Unit Training Management, this handbook will become less detailed and less redundant with itself.

Chapter 1 introduces UTM processes and the online resources that support unit training.

Chapter 2 discusses how units determine training focus using key collective tasks (KCT) based on the mission and guidance given by the higher commander. It also expands on the ADP/ADRP concept of the Commanders’ Dialogue, which provides the venue for the higher commander to approve the unit KCTs.

Chapter 3 discusses the development of a training Course of Action (COA), its approval at the Training Briefing (TB) and subsequent publication of the Unit Training Plan (UTP).

Chapter 4 covers the details of how to plan and execute the training events (plan-prepare-execute-assess) that comprise the UTP. It provides a detailed explanation of the T-Week concept and the unit actions required to coordinate and resource training events.

Chapter 5 discusses the processes of evaluating and assessing training to accurately measure training readiness.

Appendix A, Delivering Quality Training is a discussion of the characteristics and techniques used in delivering quality, effective, performance-oriented training.

Appendix B, Leader Development talks about leader development and how leaders are developed as the unit trains. It also discusses the senior leader’s responsibility in planning and executing leader development plans that capitalize on training events as the prime venue to develop subordinate leaders.

Appendix C, Organizational Inspection Program (OIP) for Training is a checklist and guide that units can use to do a detailed review of their own internal training management processes.

Appendix D, After-Action Reviews are the concepts and details of planning and executing unit After-Action Reviews (AAR). This is also available as The Leader’s Guide to After-Action Reviews found on ATN.
Appendix E, Company-Level Training Meetings are the details of how company-level units plan and execute weekly training meetings. This is also available as The Leader’s Guide to Company Training Meetings found on ATN.

Appendix F, Training and Evaluation Outlines (T&EO) discuss the importance of Training and Evaluation Outlines (T&EO) and how to find and use them.

Appendix G, Using CATS to Develop a Unit Training Plan (UTP) discusses how CATS can assist in the development of the UTP.

Appendix H, Task Numbering is a guide to understanding Joint and Army task numbering systems.

**USER NOTE:** This leader’s guide is formatted to optimize 2-sided printing. Select the “2-sided” option when printing.

The proponent for The Leader’s Guide to Unit Training Management (UTM) is the United States Army Combined Arms Center (CAC). The preparing agency is the Training Management Directorate (TMD) within CAC–Training (CAC–T). CAC–T is subordinate to the United States Army Combined Arms Center. TMD is the Army lead for training management. Send comments through the Army Training Network (ATN) at [https://atn.army.mil](https://atn.army.mil) using the “Ask-A-Trainer” feature and using the term “UTM” in the subject line.
Chapter 1

Training Units and Developing Leaders

Unit Training Management (UTM) is the process commanders, leaders and staffs use to plan-prepare-execute-assess unit training and leader development. UTM also helps identify the resources needed to conduct effective, performance-based training and leader development. This chapter provides a broad overview of the UTM process.

Unit Training Management (UTM)

1-1. Soldiers, leaders and units train to become proficient at conducting operations. Training occurs primarily at home station, but continues while the unit is deployed. Training is a demanding and continuous process. It requires the same level of discipline, planning and execution that a unit applies to conducting operations. The purpose of unit training management is to build and maintain ready units to conduct unified land operations.

1-2. Units train to attain mastery of individual and collective tasks under the demanding conditions of the anticipated operational environment. Ensuring quality training gives Soldiers, leaders and unit’s confidence in their abilities to consistently accomplish the mission under stressful conditions. Training also prepares units to adapt rapidly to unanticipated situations and respond aggressively to new missions.

1-3. Leader development is an integral component to unit training. The primary means for developing leaders is as the unit trains. Leaders use training events to train, educate, and provide experience to subordinates. Leaders coach and teach, providing feedback on performance, making on-the-spot corrections, and conducting after-action reviews.

1-4. There are three major activities that commanders do to train their units to proficiency to meet mission requirements. These are: determine key tasks to train; develop a plan to train the unit and; plan and conduct training (plan-prepare-execute-assess):

1. **Determine key tasks to train.** The unit commander will refer to the mission given by the higher commander to determine what key (most important) collective tasks the unit must perform. In operations terms, these key tasks are essential tasks. In a training environment, units train collective tasks. These are called Key Collective Tasks (KCT) – the tasks the unit will focus training on. These are further codified with task, conditions and standards – and the associated performance measures. Units train KCTs to a level of proficiency to ensure mission success. Without standards, and associated performance steps and measures, effective training cannot be accurately measured or achieved.

2. **Develop a plan to train the unit.** Once the correct KCTs are determined and approved, the unit commander begins to lay out training events over time.
He/she does this in a progressive way (crawl-walk-run) that trains the unit in the prescribed time available. The Combined Arms Training Strategies (CATS) can provide an effective starting point for doing this. This resultant Course of Action (COA) becomes the unit’s overarching plan to train called the Unit Training Plan (UTP).

3. **Plan and conduct training (plan, prepare, execute, assess).** The commander and all unit leaders use the operations/training management process as they plan and execute each of the training events that comprise the UTP. Planning training events is no different than planning for an operation. The commander, as well as all unit leaders’ physical presence and participation at training is essential - it sends the message that training is critical to the success of the unit. Resource planning and coordination is also vitally important – without the right resources available at the right time, meaningful and effective training cannot occur and valuable, irreplaceable training time will be lost.

![Diagram of the Unit Training Management (UTM) process]

Figure 1-1. The Unit Training Management (UTM) process

1-5. Adherence to training management principles and fundamentals help ensure the unit can accomplish its assigned mission. Once the unit has identified a plan to train, the development of training events follows the operations/training management process *(train as you will fight).* Units plan, prepare, execute and assess training just as they would an operation.

**The Operations Process**

1-6. As stated in ADRP 7-0 there is no separate ‘training management process’. Units deploy and operate using the operations process as defined by [ADRP 5-0](#) and [ATTP 5-0.1](#). Planning training is no different than planning an operation. This manual follows the Military Decisionmaking Process (MDMP) when developing a training COA and when planning a training event. This approach supports the training principle “*Train as you will fight*”. Leaders familiar and comfortable with the operations process in training will more easily adapt to planning and executing operations.
Military Decisionmaking Process (MDMP)

1-7. Commanders drive unit training the same way they drive operations. Battalions and brigades use the military decisionmaking process (MDMP) to plan training, while companies and below use troop leading procedures (TLP) (see ATTP 5-0.1). The process begins with receipt of the mission from the higher commander. UTM seeks to answer two fundamental questions: what tasks must the unit train? And, how will the unit train?

**Figure 1-3. The military decisionmaking process in the development of the UTP**
Troop Leading Procedures (TLP)

1-8. TLP is a much more informal process compared to MDMP. MDMP and TLP are similar but not identical. They are both linked by the basic Army problem-solving process. Company-level and smaller units lack formal staffs and use TLP to plan and prepare for training and operations. This places the responsibility for planning primarily on the commander or small unit leader. Many of the requirements are the same however. Although this Leader’s Guide focuses on MDMP, company level leaders should follow these general concepts and procedures as they develop training plans for their unit. The steps to TLP are:

Step 1 – Receive the mission

Step 2 – Issue a warning order

Step 3 – Make a tentative plan

Step 4 – Initiate movement

Step 5 – Conduct reconnaissance

Step 6 – Complete the plan

Step 7 – Issue the order

Step 8 – Supervise and refine

Task Proficiency

1-9. Units train to achieve superior performance in task execution (focusing on the KCTs). The “mastery” of tasks is about training tasks to a high level of proficiency – the task becomes second nature, executed under difficult and varying conditions. The goal is not just to achieve a trained “T” assessment. ADRP 7-0 defines mastery as “the ability to perform the task instinctively, regardless of the conditions, as the desired level of proficiency”. Units master tasks by:

- Limiting the number of tasks to the few key tasks required to accomplish the mission.
- Changing the conditions in which the task is trained.
- Increasing the realism (replicating the Operational Environment (OE)) in which the task is trained.
- Conducting multiple iterations of the task (retrain/retry).
• Changing out key personnel (leaders) as the task is executed to give the unit and leaders depth.

Task Standards

1-10. Leaders know and enforce standards to ensure their organization meets mission requirements. Where no standard exists, the commander establishes one and the next higher commander approves it. For individual and collective tasks, standards can be found in the task’s Training and Evaluation Outline (T&EO) (see appendix F).

Determine Key Tasks to Train

1-11. All units train and operate based on missions assigned by higher authority. In most cases, the higher commander assigns subordinate units a mission commensurate with its as-designed capabilities. The mission determines the tasks needed to train to be proficient to conduct operations. On receipt of a mission, commanders inform their subordinates and staffs of the mission and conduct a “mission analysis”.

1-12. The primary output of mission analysis are the unit’s Key Collective Tasks (KCT). The success of the unit in executing the mission is tied directly to the ability of the unit to master the KCTs. It is the KCTs that provide the unit its training focus, not the unit METL. Once the KCTs are determined, the commander discusses these and other related issues with the higher commander in the Commanders’ Dialogue. Once the KCTs are approved, the commander can plan how the unit will train.

![Mission to Key Collective Tasks (KCT)](image)

**Key Collective Tasks (KCT)**

- Essential Task (collective task)
- Essential Task (collective task)
- Essential Task (collective task)

**KCTs are the collective tasks the unit trains to proficiency:** “… commanders select the few - the most important - collective tasks on which the unit must train.”

ADRP 7-0

Figure 1-4. Mission link to Key Collective Tasks (KCT)

Develop a Plan to Train the Unit

1-13. Following receipt of the mission, the planning process continues by directly linking the KCTs to specific training events in a progressive “craw-walk-run” methodology (simple individual and collective tasks to increasingly complex unit collective tasks). An effective
mechanism for doing this is by using the CATS planning tool. The focus of training is on a progression of training events based on collective tasks.

1-14. This process begins with "backward planning" – determining the training event(s) at the end of the planning horizon that demonstrate the unit’s mastery of the KCTs. The final training event in this process is the Culminating Training Event (CTE). Typically, a CTE is a Mission Rehearsal/Readiness Exercise (MRE/MRX), a WarFighter Exercise, or a major exercise designated by the commander that provides a venue to demonstrate a unit’s ability to perform the KCTs to a “T” (trained) assessment. Then working backward, the unit progressively adds training events from the CTE to the start point of the planning horizon (from complex back to simple) based on the events that train the KCTs. Each unit training plan nests with and supports the major training events of the higher unit it supports.

1-15. The result of this planning is a Course of Action (COA) which describes the sequence of events that provide the venue for training the unit’s KCTs. The commander selects a COA and briefs it to the higher commander during the Training Briefing (TB). The COA selected represents the most effective use of time and resources to train the KCTs and other supporting collective tasks. The higher commander then approves or modifies the COA at the briefing. The resulting approved COA becomes the Unit Training Plan (UTP). The UTP is then published to subordinates and prepared for execution.

1-16. The UTP is the unit’s over-arching plan to attain KCT proficiency in the time allotted to train (planning horizon). Commanders, leaders and training managers plan-prepare-execute and assess each training event as the UTP progresses. Each training event is planned and coordinated in detail prior to execution. This is done during company-level training meetings using the “T-Week” construct. This process has to start early enough in the planning cycle to ensure all required resources are present and accounted for as training begins. Unless this is done, training proficiencies as the commander envisions will not happen. Each unit has to have a deep understanding of the local and installation-level resources that are available. This also includes understanding training resource cycles and conferences to ensure the unit can influence these cycles early enough to get the resources needed to train.

1-17. Rehearsals and pre-combat checks before training begins are critical to success, just as it is when a unit is operating. Planning for time to retrain is also important. If the unit/individual
fails to meet the training objectives for a specific training event, time must be allocated to ensure that the task(s) can be retrained successfully before the event is concluded.

**Evaluate and Assess Training**

1-18. Training is evaluated and assessed continuously throughout the execution of the UTP. An assessment plan to determine KCT and supporting collective task proficiency should be developed for each training event. Company-level training meetings provide constant feedback to the commander on KCTs trained, as well as a platform to ensure coordination for training resources. The resource requirements are confirmed, verified, and in place. This continual evaluation and assessment of the KCTs as the unit executes the UTP is vital to ensuring the UTP remains on track. Weekly training meetings and periodic training briefings to the higher commander provide the venues for commanders to review UTP progress and make modifications to the plan as necessary.

1-19. As training is executed, commanders and leaders evaluate and assess tasks using Training and Evaluation Outlines (T&EOs). These outlines provide task, conditions, standards, performance steps, performance measures and other supporting information related to the task (both individual and collective). They are the primary source for Army task standards. The results of these observations are provided to the commander, typically during weekly training meetings. They provide the commander valuable data for him to make an assessment of the KCTs trained. Additionally, assessments of the KCTs provide the commander information and results from which to assess the unit’s METs for USR reporting requirements.

1-20. After-Action Reviews (AAR) are an important activity that are part of the unit’s assessment plans. AARs are performed during training and at the conclusion of training. They can be informal, or can be formal, such as an AAR conducted at the conclusion of a Mission Rehearsal Exercise (MRE) at a Maneuver Combat Training Center (MCTC). AARs provide a venue for the Soldiers and leaders being trained to self-discover what was planned, what actually occurred and what should be sustained/done better.

**Key Collective Tasks (KCT)**

1-21. Key Collective Tasks (KCT) are those essential tasks expressed as collective tasks that the unit must perform to the Army standard to achieve the desired training mission end-state. KCTs are derived through mission analysis, approved by the higher commander and provide the unit focus for attaining training proficiency.

1-22. Because units cannot be proficient in all their design capabilities simultaneously due to time, resource availability and other factors, commanders seek to focus training on those few, most important collective tasks that ensure mission success. These tasks also infuse the versatility into a unit, allowing them to adapt to new missions quickly. The unit commander will then determine the KCTs the unit must train to be proficient in accomplishing the assigned mission.
Mission-Essential Task (MET)

1-23. A Mission-Essential Task (MET) describes a specific unit design capability compiled in a Mission-Essential Task List (METL). The unit METL does not provide training focus for the unit, but it does provide a “menu” of tasks (capabilities) the unit was designed to perform.

1-24. There is a direct link between the unit’s assigned mission, the KCTs it trains on and the unit METL it reports on using the Unit Status Report (USR). Missions are assigned based on the unit’s design capabilities. Those mission-related capabilities are then directly reflected in the KCTs the unit will train. Because KCTs train a portion of the unit’s capabilities, they also directly relate to unit METs.

Figure 1-6. The relationship between mission, KCT and METL

1-25. METL plays a crucial role in Unit Status Reporting (USR). Training readiness reporting is expressed in the USR as an assessment of the units METs. In most instances, the KCTs will only train a portion of the unit METs. While the unit focuses its training efforts on attaining proficiency in the KCTs (based on mission requirements), some METs may not be trained to proficiency and this is reflected by the commander in the USR.

1-26. The exception to the general rule that mission relates to KCT then relates to METs is when the unit is given an “out-of-design” mission. An “out-of-design” mission is one for which the unit was not designed to accomplish. A simple example is a Field Artillery battalion assigned the mission of providing wildfire support to civil authorities. In this case most, if not all, of the KCTs trained that support the mission will not relate to the unit’s METL. For reporting training readiness on the USR, refer to AR 220-1). For further discussions about METL, refer to the tutorial: Company or Battalion METL Development. This tutorial also covers brigade-level and higher units not covered by the DA Standardized METLs.

Mandatory Training

1-27. AR 350-1, annex G covers mandatory training for units, institutions and Army civilians. Additionally, ATN and DTMS provide useful tools and information on executing mandatory training. Commanders determine the priority of training in their units. Whether it is training for
mission proficiency, or training mandatory tasks, the commander has the responsibility of managing all the unit’s training requirements. Unit training for mission proficiency is the primary focus of units as they prepare for operational deployments. The challenge for commanders is balancing the training requirements for the mission with the requirements to complete mandatory training. These two requirements often compete against each other for the scarce training time available. One technique is to decentralize mandatory training down to the lowest level possible, while centralizing reporting of completion to the higher headquarters. Ultimately, the commander decides how best to manage both concurrently. Also refer to the ATN page, Mandatory Training and DTMS>Training Manager (tab)>Search for Tasks>Mandatory.

Training Hybrid ARFORGEN/Non-ARFORGEN Units

Hybrid ARFORGEN Units

1-28. Some units’ headquarters may not be tied to a cyclical ARFORGEN cycle (see AR 525-29 for Army Force Generation (ARFORGEN)). In this case, these units often have subordinate units and elements that are “chopped” or assigned to units that are in an ARFORGEN deployment cycle. This creates a situation where some of the unit is tied to another unit’s ARFORGEN cycle, while the rest of the unit is not. The challenge for these higher headquarters is to be able to provide the right training guidance (in conjunction with the gaining commander) and provide the right resources for the unit to train and to re-create the anticipated OE.

1-29. This becomes a challenge with ARFORGEN-associated subordinate units. The key to managing training for these type units is with the concept of “training supervision” outlined in the UTM introduction. The higher commander (providing commander) must rely on and develop the relationship he/she has with the gaining commander. The goal is to ensure that the subordinate unit is properly trained and resourced before the assignment for the subordinate unit is effective.

Non-ARFORGEN-Based Units

1-30. The length of the UTP for non-ARFORGEN (TDA and other TOE units) is unit mission dependent, and can cover years for both RA and RC units not tied to an ARFORGEN cycle. The length is based on mission and commander requirements.

1-31. Typically, non-ARFORGEN units are executing their mission every day. Like all commanders, they refer to their brigade and higher-level METLs and guidance from the higher commander as a starting point. They then must craft a UTP based on ensuring that individual and collective training preserves the unit’s ability to perform their every day mission requirements.
1-32. For example, a TDA school support brigade trains to their daily support mission. They do this by ensuring courses and students are supported by trained and certified instructors. For this kind of unit, the school cycle drives the mission requirements of the unit.

1-33. The commander also has to consider the visualized end-state for training. Since this may not be driven by a deployment requirement, or major exercise support, the commander determines what the unit’s training end-state should be.

1-34. CATS are designed for operational units (units that have a TOE). TDA units may be able to develop its UTP by “borrowing” task selections/tasks from either other units’ CATS, or use an appropriate function CATS (eg mission command, sustainment, COIN, stability, etc). For a complete description of Function CATS, or using CATS for TDA units, refer to the CATS Knowledge Base on ATN.

UTM Resources

1-35. The following mutually supporting resources integrate UTM concepts and processes. These and many additional training resources are available on ATN at the Unit Training Management (UTM) page:

- **Army Doctrine Publication (ADP) 7-0.** *(Training Units and Developing Leaders, August 2012).* ADP 7-0 is an Army keystone manual, approved by the CSA, that provides a very broad overview of the Army’s current training management doctrinal concepts.

- **Army Doctrine Reference Publication (ADRP) 7-0.** *(Training Units and Developing Leaders, August 2012).* ADRP 7-0 is nested with, and provides specific descriptions of Army training concepts and processes.

- **The Leader’s Guide to Unit Training Management (UTM).** This manual and the UTM page on the Army Training Network (ATN) provide the extension of the doctrine from ADP and ADRP 7-0. UTM is the "how-to" description of processes that gives the reader the specifics of how training in units is accomplished. The web-based UTM Resource Page provides all the content of UTM, to include supporting tutorials and examples, all of which can be downloaded.

Training Enablers

1-36. Enablers are web-based UTM resources that help commanders, leaders and training managers train units. Enablers are based on the training doctrine of ADRP 7-0 and the associated processes and concepts found in UTM. The following are the primary training management enablers:

1-37. **Army Training Network (ATN)** provides a single, web-based portal to the doctrine, processes and resources used for training Army units. It is a collaborative, online resource
1-38. **Digital Training Management System (DTMS)** a web based program that provides the ability to digitally develop, record and coordinate training plans within organizations, and record training assessments/completion/readiness. DTMS is accessible through ATN at [https://atn.army.mil](https://atn.army.mil).

1-39. **Combined Arms Training Strategies (CATS)** provides proponent-recommended training strategies that are based on the TOE of the unit and the Unit Task List (UTL) established for the TOE by the proponent. The CATS identify Task Selections (TS) that are based on TOE mission, capabilities and functions, with collective tasks that are logically trained together. With each task selection, a crawl-walk-run training methodology is described using events as the means to train the collective tasks. There are two access points to CATS. The recommended route is through DTMS (which requires unit granted privileges to access). CATS in DTMS, provides the planner the capability to plan and assess training and maintain a record of collective task proficiency that contributes to METL reporting. DTMS can be located at: [https://dtms.army.mil](https://dtms.army.mil). The second, alternative method is via the CATS Viewer on ATN. This feature allows all users (no additional privileges required) to view the CATS for their unit, but doesn’t allow the user to use CATS planning tools or other electronic means to assist in development of a UTP. The CATS Viewer is accessible through ATN under the “Enablers” tab at [https://atn.army.mil](https://atn.army.mil).

1-40. **HQ, Department of the Army (DA) Standardized METL Viewer** provides an easy to navigate way to view brigade and higher-level HQDA Standardized Mission-essential task lists (METL). In addition to viewing these METLs, the user can also view the associated Task Groups (TG), as well as related collective tasks and their Training and Evaluation Outlines (T&EO). The DA Standardized METL Viewer is available on ATN’s Enablers tab, or by going to: [https://atn.army.mil/fso/default.aspx](https://atn.army.mil/fso/default.aspx)

1-41. The remainder of this manual expands on the concepts discussed above in much more detail. Training units is hard, detailed business, but it is perhaps the most rewarding task a leader does. It takes dedicated and engaged leaders and training managers at every level to keep training focused and challenging to the Soldiers and the unit overall. Preparing for mission accomplishment is the ultimate goal of UTM.

### Additional Supporting Resources (also see the [UTM page](https://atn.army.mil) on ATN)

- **Tutorial**  
  - Chapter 1 Overview
- **Video**  
  - Training Doctrine Overview
- **Tutorial**  
  - Training Enablers Overview
- **Video**  
  - ATN Overview
- **Video**  
  - HQDA Standardized METL
Please provide your comments and input to UTM. These can be made through the Army Training Network (ATN) feature “Ask-A-Trainer”, using the subject line: “UTM”.
Chapter 2

Determine Key Tasks to Train

This chapter describes how the commander conducts a “mission analysis” to determine the unit tasks to train – identifying the Key Collective Tasks (KCTs). The product of this analysis answers the question: “what tasks must the unit train?”

Receipt of a Mission

2-1. The planning process begins with the receipt of a mission from the higher commander (typically in a Warning Order (WARNO)). How the mission is received is immaterial. It can be delivered via a face-to-face meeting with the higher commander, secure email, or distributed via DTMS. Understanding the assigned mission is the beginning of the process guiding the commander and staff through the identification of the few, most important collective tasks the unit must train to successfully execute the assigned mission.

2-2. The order from the higher commander alerting the unit to a new mission should include as a minimum, the following information:

- Higher HQ’s mission statement
- Higher commander’s guidance for training
- The operational environment (OE) to replicate during training
- Planning Horizon (the time period allotted to train the unit to meet mission requirements (ie, ARFORGEN cycle, or as directed by the commander)

<table>
<thead>
<tr>
<th>Key Inputs</th>
<th>Steps</th>
<th>Key Outputs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission from higher commander</td>
<td>Step 1 Receipt of Mission</td>
<td>Commander’s initial guidance for training</td>
</tr>
<tr>
<td>Commander’s initial training guidance</td>
<td>Step 2 Mission Analysis</td>
<td>Proposed KCTs &amp; assessments</td>
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<td>Commander’s initial training guidance</td>
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<td>Unique/scaarc resources</td>
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<td>Commander’s initial training guidance</td>
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<td>Training risk</td>
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<td>Commander’s initial training guidance</td>
<td></td>
<td>Training readiness issues</td>
</tr>
<tr>
<td>Commander’s initial training guidance</td>
<td></td>
<td>Commanders’ Dialogue</td>
</tr>
</tbody>
</table>

Figure 2-1. Steps 1 & 2 of MDMP as applied to planning unit training

Major Activities on Receipt of a Mission

2-3. Commanders initiate the MDMP upon receipt or in anticipation of a mission. This step alerts all participants of the pending planning requirements, enabling them to determine the amount of time available for planning and preparation and decide on a planning approach,
including guidance. The following activities begin the process of MDMP (also refer to ATTP 5-0.1):

**Alert the Staff and Other Key Participants**

2-4. As soon as a unit receives a new mission (or when the commander directs), the commander or S3 alerts the staff of the impending planning requirement. Unit standard operating procedures (SOPs) should identify members of the planning staff who participate in mission analysis.

**Gather the Tools**

2-5. Once notified of the new planning requirement, the staff prepares for mission analysis by gathering the necessary “tools”. These tools include, but are not limited to:

- Appropriate manuals, including ADP 7-0, ADRP 7-0, The Leader’s Guide to Unit Training Management (UTM), etc.
- All documents related to the training mission including the higher headquarters’ WARNO, etc.
- Both their own and the higher headquarters’ training SOPs.
- Access to training enabler websites – as a minimum ATN, CATS (to include the CATS planning tool on DTMS), DTMS, and HQ DA Standardized METL Viewer.

2-6. The gathering of knowledge products continues throughout the MDMP. Staff officers carefully review these applicable resources as the planning process proceeds (to include information contained on the above enabler websites).

**Update Running Estimates**

2-7. While gathering the necessary tools for planning, each staff section begins updating its running estimate when planning unit training. A running estimate is the continuous assessment of the current situation used to determine if current training is proceeding according to the commander’s intent and if planned future training is supportable (ADRP 5-0). Commanders maintain their running estimates to consolidate their understanding and visualization of the training end-state. The commander’s running estimate summarizes the problem and integrates information and knowledge of the staff's and subordinate commanders’ running estimates. The commander and each staff section continuously consider the effects of new information. This would include the current status of KCTs, the status of installation training facilities, ranges and TADSS availability. While listed at the beginning of the MDMP, the task of developing and updating running estimates continues throughout the MDMP and during weekly training meetings.

**Conduct an Initial Assessment**

2-8. The commander and staff also conduct an initial assessment of training time (planning horizon) and resources available to plan, prepare, and begin execution of training. This initial assessment helps commanders determine:
• The time needed to plan and prepare for training to mission proficiency for both headquarters and subordinate units.

• Guidance on planning, to include abbreviating the MDMP, if required.

• Which outside installation agencies and organizations to contact and incorporate into the planning process.

• The staff’s experience and cohesiveness.

One-Third, Two Thirds Planning Method

2-9. This assessment primarily identifies an initial allocation of available planning time. The commander and staff balance the desire for detailed planning against the need for immediate action. The commander provides guidance to subordinate units as early as possible to allow subordinates the maximum time for their own planning and preparation of operations. As a rule, commanders allocate a minimum of two-thirds of available time for subordinate units to conduct their planning and preparation. This leaves one-third of the time for commanders and their staff to do their own planning. They use the other two-thirds for their own preparation. Time, more than any other factor, determines the detail to which the commander and staff can plan. Based on the commander’s initial allocation of time, the COS (XO) develops a staff planning timeline that outlines how long the headquarters can spend on each step of the MDMP.

Issue the Commander’s Initial Training Guidance

2-10. In time-sensitive situations, commanders may also issue guidance on how to abbreviate the process. Having determined the time available, together with the scope and scale of the planning effort, commanders issue initial planning guidance. Although brief, the initial guidance includes, but is not limited to:

• Initial time allocations.

• How to abbreviate the MDMP, if required.

• External coordination as necessary.

• Collaborative planning times and locations.

• Initial information requirements.

• Additional staff tasks.

Issue the Initial Warning Order

2-11. The last task in receipt of mission is to issue a WARNO to subordinate and supporting units. When providing initial training guidance, the higher commander tries to focus and narrow missions and tasks to subordinates that are appropriate to the unit capabilities and attainable within the specified planning horizon. Too many missions or tasks dilute the
subordinate units’ ability to fully train to mission proficiency. This is especially true in a time and resources constrained home station training environment.

Mission Analysis

Determining Training Focus

2-12. All units train to a mission. That mission is always provided by the higher commander. Commanders train their units on either their core capabilities (the tasks the unit was designed to perform) or an “out-of-design” mission (a mission the unit was not designed to perform).

![Figure 2-2. All units train to a mission](image)

2-13. Because of limited time, manpower, equipment, training ranges/facilities and other resource constraints, it is not possible for units to adequately train and master all unit capabilities simultaneously. Whether training to core capabilities, or an out-of-design requirement, the unit must focus its training efforts. In order to do this, the unit conducts a mission analysis to determine the tasks to focus their training. The concept of Key Collective Tasks (KCT) provides a methodology using mission analysis, for commanders and staffs to identify the “few – the most important – collective tasks on which the unit must train.” ([ADRP 7-0](#))

2-14. Commanders (supported by their staffs and informed by subordinate and adjacent commanders) gather, analyze, and synthesize information to orient themselves on the current conditions of the training environment. The commander and staff conduct mission analysis to better understand the situation and problem, and identify what the command must train, when and where it must be done, and most importantly why—the purpose of the training.

2-15. Mission analysis is the most important step in the MDMP. This understanding of the situation and the problem allows commanders to visualize how unit training may unfold and describe it in their initial commander’s intent and training guidance (the Unit Training Plan (UTP)). The primary product of this analysis is the identification of the unit’s KCTs, but the analysis also identifies other vital planning information, to include:

- Specified, implied and essential tasks
- Current and projected KCT assessments
- Unique or scarce training resources needed to train
- Training risk (time/resources)
- Significant training readiness issues
Identifying KCTs

2-16. Key Collective Tasks (KCT) are those essential tasks expressed as collective tasks that the unit must perform to the Army standard to achieve the desired training mission end-state. KCTs are derived through mission analysis, approved by the higher commander and provide the unit focus for attaining training proficiency.

Step 1

2-17. Analyze the higher headquarters WARNO that specifies the training mission. The purpose of this is to determine how the unit—by task and purpose—contributes to the training mission. The commander and staff seek to completely understand the higher commander’s:

- Mission
- Intent for training
- Concept of operations for training
- Available assets
- Training timeline (ARFORGEN, or as directed)
- The missions of adjacent, supporting, and supported units and their relationships to the higher headquarters plan

Step 2

2-18. Identify the specified and implied tasks.

A specified task is a task specifically assigned to a unit by its higher headquarters. Paragraphs 2 and 3 of the higher headquarters WARNO and estimates state specified tasks. Some tasks may be in paragraphs 4 and 5. Specified tasks may be listed in annexes and other attachments. They may also be assigned verbally during collaborative planning sessions or in directives from the higher commander.

An implied task is a task that must be performed to accomplish a specified task or mission but is not stated in the higher headquarters order. Implied tasks are derived from a detailed analysis of the higher headquarters order, the projected operational environment, the terrain, and civil considerations. Additionally, analysis of doctrinal requirements for each specified task might disclose implied tasks.

Step 3

2-19. Identify the essential tasks. Once staff members have identified specified and implied tasks, they ensure they understand each task’s requirements and purpose. Once accomplished, the staff then looks for essential tasks. An essential task is a specified or implied task that must be executed to accomplish the mission. Essential tasks are always included in the unit’s mission statement.

2-20. As part of this process, specified, implied and essential tasks are expressed as collective tasks, since these must be trained to a specified level of proficiency. All collective
(and individual tasks) have stated task, conditions, standards and performance steps and measures. These are published in the task’s Training and Evaluation Outline (T&EO). These are readily available in ATN, CATS and DTMS. Units use T&EOs as a primary means to measure proficiency levels as the task is being executed. Without these, the Army standards are not being trained.

Figure 2-3. Identifying tasks from the training WARNO

2-21. Scenario: 1-32, Combined Arms Battalion (CAB) has received a WARNO from its higher HQ, 1st Brigade. Following an analysis of this order, the CAB commander re-states the training mission for his battalion:

“NLT 020400OCT15, 1-32 CAB trains at Fort Custer in a Decisive Action Training Environment (DATE) to achieve proficiency in the following tasks; Conduct a Movement to Contact (MTC), Conduct an Attack, and Conduct a Defense IOT deploy NET 02OCT16 to conduct operations.”

2-22. The order also states that the unit will have to pass through the unit already in position and that there is the possibility of the enemy using chemical munitions. In this example, the battalion staff identifies the specified and implied tasks as:

**Specified Tasks:**
- Conduct a Movement to Contact (07-6-1072)
- Conduct a Passage of Lines (07-6-1081)
- Conduct an Attack (07-6-1092)
- Prepare for a Chemical Attack (03-6-0070)
- Conduct a Defense (07-6-1028)

**Implied Tasks:**
- Conduct a Combined Arms Breach of an Obstacle (07-6-1252)
- Plan Fire Support (71-8-0308)
- Synchronize Close Air Support (17-6-0308)
- Conduct MDMP (71-8-5111)
- Execute the Operations Process (71-8-5100)
- Conduct Command Post Operations (71-8-5200)
2-23. Then referring back to the unit’s re-stated mission and the specified and implied tasks, the essential tasks for the battalion are further identified:

**Battalion Mission:**
NLT 020400OCT15, 1-32 CAB trains at Fort Custer in a Decisive Action Training Environment (DATE) to achieve proficiency in the tasks; Conduct a Movement to Contact (MTC), Conduct an Attack, and Conduct a Defense IOT deploy NET 02OCT'16 to conduct operations.

<table>
<thead>
<tr>
<th>Specified Tasks:</th>
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<tbody>
<tr>
<td>• Conduct a Movement to Contact (07-6-1072)</td>
</tr>
<tr>
<td>• Conduct a Passage of Lines (07-6-1081)</td>
</tr>
<tr>
<td>• Conduct an Attack (07-6-1092)</td>
</tr>
<tr>
<td>• Prepare for a Chemical Attack (03-8-0070)</td>
</tr>
<tr>
<td>• Conduct a Defense (07-6-1028)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Essential Tasks:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Conduct a Movement to Contact (07-6-1072)</td>
</tr>
<tr>
<td>• Conduct an Attack (07-6-1092)</td>
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</tr>
<tr>
<td>• Conduct Command Post Operations (71-8-5200)</td>
</tr>
</tbody>
</table>

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**Figure 2-4. Determining essential tasks**

**Step 4**

2-24. These essential tasks, tied directly to the unit’s mission, now become the unit’s Key Collective Tasks (KCT):

**KCTs:**
- Conduct a Movement to Contact (07-6-1072)
- Conduct an Attack (07-6-1092)
- Conduct a Defense (07-6-1028)

2-25. The KCTs are now the collective tasks the unit will focus its training efforts on to meet mission requirements. The remaining specified and implied tasks identified by the battalion staff become supporting collective tasks under the appropriate KCT.

**KCT to METL Crosswalk**

2-26. The KCTs should crosswalk directly back to a unit METs when the unit is training to as-designed capabilities. Since METs are capabilities-based and the mission is directly related to a unit capability, the crosswalk should clearly link between the two. This provides a high level of assurance that the unit’s mission meshes with the assigned mission.

2-27. When training to an “out-of-design” mission (eg – a Field Artillery battalion assigned the mission of a transportation unit), the KCTs will not directly crosswalk back to the unit METL. This will affect how the unit reports training readiness via the Unit Status Report (USR) (see AR 220-1).
Assessing KCTs

2-28. Next, the commander conducts a current assessment and a projected assessment of the KCTs. By doing these assessments, the commander creates a logical start point for describing the current state of KCT training readiness and projects the point in time he believes the unit will, or should, be with regard to KCT readiness. The time in between the current and projected assessment provides the commander a way to frame and visualize the necessary training.

2-29. For the current assessment, the commander, using bottom-up feedback from subordinates, personal experience and observations, inspection results, and other inputs makes an assessment [T (Trained), P (Needs Practice), or U (Untrained)] of each of the proposed KCTs. This gives the commander a sense of where the unit stands with regard to current training readiness. It also gives him a sensing of the effort, time and resources it will take to get the unit to a “T” assessment at the end of the planning horizon.

2-30. The projected assessment is the commander’s “best guess” at the T-P-U rating of the KCTs when training is anticipated to begin and at various point along the planning horizon. Where the unit is in relationship to the KCTs may be significantly different now than at the start of training. Weeks and months may separate the training readiness of the KCTs in that time. Keeping in mind that at this point in mission analysis, the KCTs have not yet been approved by the higher commander. Once the KCTs are approved in the Commanders’ Dialogue, the projected assessment of the KCTs represents a bench mark for the further development of a Course of Action (COA).

2-31. In the following example, an Armored Brigade Combat Team (ABCT) is redeploying to CONUS home station with a current proficiency of mostly P’s and T’s. However, the commander projects all U’s in the KCTs at the beginning of RESET due to personnel rotations, equipment shortfalls and other factors affecting training readiness (the KCT Training Short video KCT describes the concept of Key Collective Tasks (KCT).

<table>
<thead>
<tr>
<th>Key Collective Tasks (KCTs)</th>
<th>Current</th>
<th>ARFORGEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct a Movement to Contact (07-6-1072)</td>
<td>P</td>
<td>U</td>
</tr>
<tr>
<td>Conduct an Attack (07-6-1092)</td>
<td>P</td>
<td>U</td>
</tr>
<tr>
<td>Conduct a Defense (07-6-1028)</td>
<td>U</td>
<td>U</td>
</tr>
</tbody>
</table>

Figure 2-5. Combined Arms Battalion (CAB) KCT list with current & projected assessments

Determine Unique or Scarce Training Resources

2-32. After identifying, analyzing and assessing the proposed KCTs, commanders determine the availability of scarce or unique training resources required to train the KCTs to a “T” assessment. An excellent source for this information can be found in CATS. In the CATS report (the Combined Report on ATN, or the AC or RC report for a Task Selection (TS) on DTMS) generalized figures are provided for equipment, classes of supply, etc that support specific training events. These figures provide a starting point to apply the realities of the local, home station training environment.
2-33. An example might be a range facility not available on home station, but may be important to train one of the KCTs. Unique or scarce resources would not include resources that are normally available at the home station, unless there are scheduling issues.

**Determine Training Risk**

2-34. Training risk is not a consideration of personnel safety, but determining the risk in not having sufficient training time, or not having the unique or scarce resources necessary to achieve KCT proficiency. Identifying these “show stoppers” during mission analysis is important because it represents potentially significant road blocks to accomplishing mission proficiency.

2-35. KCTs are selected to support the mission and provide training focus for the unit. The selection of KCTs have already narrowed to the essential tasks that must be trained, therefore there is no training risk in not training other tasks. For example, in order to achieve training focus through the KCTs, some unit capabilities (METs) may not be trained at all, or not trained to a “T” proficiency. Not training to some unit capabilities (METs) does not represent a “training risk” since the commander has chosen to focus training on the KCTs to meet mission requirements. Commanders discuss training risk with their higher commander during the Commanders’ Dialogue in order to ensure the higher commander is aware of these

**Significant Training Readiness Issues**

2-36. The commander also makes note of the unit METL tasks/capabilities that will not be trained for the assigned mission and the impact this will have on USR reporting. This may represent a training readiness reporting issue that must be brought to the attention of the higher commander for further discussion.

**Commanders’ Dialogue**

2-37. The Commanders’ Dialogue is the back-brief and discussion of the results of mission analysis to the higher commander. It is the briefing in which the two commanders agree to the tasks the unit will train to meet mission requirements. At the conclusion of this briefing, the higher commander approves or modifies the proposed KCTs. Specifically, the two commanders discuss:

- Proposed KCTs
- Current and future projected KCT assessments
- Review the planning horizon and the time allotted to train
- The Operational Environment (OE) to replicate
- Any unique or scarce resource the unit will need to train that require the higher commander’s support to obtain
- Potential training risks (time/resources) and mitigation actions
- Significant training readiness issues
2-38. The dialogue can often take up to two hours. The majority of the time will focus on the KCTs and identified training risks since those areas will require mutual understanding between the two commanders. Formal dialogues are conducted at the company-level and above. Below company-level, a dialogue occurs between the company commander and platoon leaders, and between platoon leaders and squad leaders. At these levels, the dialogue should cover the same discussion points.

![Figure 2-6. Unit mission to Key Collective Tasks (KCT)](image)

2-39. Now that the Commanders’ Dialogue is complete and the unit KCT’s are approved by the higher commander, the next step in the UTM process is to develop a plan to train the unit.

**Additional Supporting Resources (also see the [UTM page on ATN](https://www.atn.mil/))**

- **Tutorial**  Chapter 2 Overview
- **Tutorial**  Finding Tasks and Using T&EOs
- **Tutorial**  Training Resource Considerations
- **Tutorial**  Training Resources in CATS
- **Example**  WARNO to the Unit Training Plan (UTP) OPORD
- **Video**  Key Collective Tasks (KCT)
- **Video**  Commanders’ Dialogue
Chapter 3
Develop a Plan to Train the Unit

This chapter describes how training managers develop the best Course of Action (COA) to train the unit. At the conclusion of COA development, the unit commander selects the best COA to train and briefs the plan to the higher commander who approves it at the Training Briefing (TB). The approved COA then becomes the Unit Training Plan (UTP). The product of this process answers the question: “how will the unit train?”

Introduction

3-1. The process of planning begins once the Commanders’ Dialogue output is known. Developing a viable COA to train the KCTs is the focus of the planning process. Given the approved KCTs, the planning horizon, knowledge of the resources required to train and the higher commander’s training guidance, the development of a COA can begin. This COA will take the unit from a training starting point through to attaining KCT proficiency. In order to begin that process, leaders must first gather the information they know.

3-2. There are three sections to this chapter:

Section I, Planning Considerations provides leaders and planners basic, fundamental concepts to understand and consider before developing a unit training COA.

Section II, COA Development walks the planner through the COA development process as planning progresses. The unit commander selects the best COA to train and briefs it to the higher commander during the Training Briefing (TB).

Section III, Unit Training Plan (UTP) continues with the creation and publication of the Unit Training Plan (UTP).
Section I
Planning Considerations

Introduction

3-3. In addition to the output of the Commanders’ Dialogue, planners should have an understanding of key planning factors. The primary goal is to create a plan that takes the unit from a projected training start point and progressively builds on KCT proficiencies to a training end-state. This end-state corresponds to the commander’s visualized end-state for training and directly supports the mission. Building a Course of Action (COA) takes into account the unit’s current training proficiencies, the home station training environment, installation resource availability and leadership knowledge and experience. Whether planning within the framework of MDMP or TLP, the following planning concepts should be considered:

- Assess the KCTs.
- Lay-out the planning horizon.
- Determine training events
- Identify training objectives.
- Apply the command/installation time management cycle.
- Use a backward planning approach.
- Use a multiechelon training approach.
- Use a crawl-walk-run methodology.
- Consider live, virtual, constructive and gaming (LVC-G) training support.
- Replicate the Operational Environment (OE).

Assess the KCTs

3-4. When developing COAs, commanders begin by assessing the KCTs. This includes making a current assessment now, again when training begins, and then project assessments at critical points on the planning horizon. This provides the commander an understanding of KCT proficiencies at selected points along the planning horizon. For example, an ARFORGEN unit redeploying will consider the state of the KCTs at the end of the RESET cycle, at TRAIN/READY, etc which may be months away.
3-5. The commander may then consider the KCT proficiencies he wants the unit to be at, perhaps at ARFORGEN Aim Point 1, etc. This technique does not just apply to units in an ARFORGEN construct, but is a useful tool for commanders of any unit or organization (TDA, etc) as way to project desired KCT proficiencies in the future. Understanding the commander’s expectations for KCTs proficiency at various points on the planning horizon helps to frame the sequencing of training events.

Lay-out the Planning Horizon

3-6. Understanding the planning horizon is extremely important as planning begins. Once planners begin to apply the actual days available to train a COA, it will become evident that time is the greatest restricting factor when it comes to planning unit training. Planners have to contend with installation/command time management cycles, resource and facilities constraints, limited classes of supply, etc. Additionally, the unit will have to compete with other units on the installation, all vying for the same limited resources. A simple calendar format depicting the planning horizon is an excellent starting point to begin this process. The CATS planning tool in DTMS can help visualize the planning horizon across time.

Determine Training Events

3-7. Commanders link training strategies to training plans by designing and planning training events. Training events are the building blocks that are the foundation of a COA. During COA development, commanders and staffs broadly assess the number, type, and duration of training events that may be required to train the KCTs to proficiency.

3-8. Effective training events are well-coordinated and use OE-based scenarios. They focus the entire organization on one or more KCT during the event. Well-developed events incorporate conditions replicating the anticipated operational environment as much as possible. They place Soldiers and leaders in ambiguous, uncertain, and rapidly changing conditions. Training should include events that require leaders and units to make quick transitions between KCTs to build decision-making agility and confidence.

3-9. All training events require training areas, facilities and resources to support. Some events may require opposing forces (OPFORs), observer-controller/trainers, and role players. Other events may need training support system products and services, such as instrumentation and training aids, devices, simulators, and simulations (TADSS). Finally, a training event itself is only a tool to meet and sustain KCT proficiency. All training events should be evaluated for their contribution to training readiness and mission preparedness.
KCTs to Training Events

3-10. KCTs are not trained in a vacuum – they are trained with other collective and individual tasks during training events. Knowing what training events train the KCTs is an important first step in the COA development process. Ideally, the right series of training events will train multiple KCTs. Determining the right mix and sequence of training events is vital in ensuring valuable training time and resources are maximized.

Task Selections (TS)

3-11. An important tool in associating KCTs to training events are Task Selections (TS). TS’s are groupings of collective tasks that are logically trained together. Proponents, like Infantry, Aviation, Signal, etc have already done the detailed work of developing TS’s as depicted in the Combined Arms Training Strategies (CATS). In the past, commanders would use personal experiences, or an understanding of historic training events and documents (inspection results, AARs, etc) from the unit’s past to make the association between the tasks to train and the training events that train them. Although this is still a viable process, a better starting point is to identify the TS’s that will train the KCTs using CATS.

3-12. TSs are the basic building block of CATS and are available through two features available on ATN (see also CATS in Enablers in chapter one). The CATS viewer on ATN allows direct access to TSs, based on proponent listings. All Soldiers can access CATS in this manner. TSs are also available in the Digital Training Management System (DTMS), also available via ATN. The CATS application in DTMS requires unit-granted privileges to access, and also provides an expansive set of planning tools not available in the CATS viewer on ATN. See the tutorials on accessing the CATS Viewer on ATN and in DTMS.

3-13. Figure 3-3 below depicts the relationship between a KCT and a CATS TS. TSs are already aggregated by training events and the collective tasks that can be trained during the events. Since KCTs are collective tasks, associating KCTs back to training events is a simple task. Additionally, the training events are already identified as being crawl, walk, or run level events.
Identify Training Objectives (TO)

3-14. A training objective is a statement that describes the desired outcome of a training activity in the unit. A training objective consists of the task, conditions, and standard (ADRP 7-0). TOs represent what the commander wants to achieve at the conclusion of each training event. TOs help chart the course for how training events contribute to KCT proficiency:

- **Task.** A clearly defined and measurable activity accomplished by organizations and individuals.
- **Condition(s).** The circumstances and environment in which a task is to be performed.
- **Standard.** The minimum acceptable proficiency required in the performance of a particular training task.

3-15. Think of training objectives as tactical objectives; they are focused on the effects the commander wants to achieve. In this case, the effects are focused on progressively (crawl-walk-run) mastering the KCTs. Training objectives help the unit focus on what needs to be accomplished during each event and how the event contributes to the overall attainment of the commander’s visualized end-state. The training objective can be a simple statement of goals for the event, or could be as complex as aligning the KCTs being trained, along with the anticipated final assessment of these at the end of the event. Training objectives are identified for each multiechelon training event that comprises a COA. They are also developed and published for each training event internal to the unit.

**Key Collective Task (KCT): Conduct an Attack**

**Conditions:** The brigade is conducting operations independently or as part of a division or Army forces (ARFOR) and has received an operation order (OPORD) or fragmentary order (FRAGO) to conduct an attack at the location and time specified. Coalition forces and noncombatants may be present in the operational environment.

**Standards:**

1. Brigade leaders gain and or maintain situational awareness (SA). Brigade commander and staff receive an order or anticipate a new mission and begin the military decisionmaking process (MDMP). Brigade task organizes forces within the brigade.

2. Effects coordination cell (ECC) obtains guidance from the commander, plans, coordinates, and achieves the desired effects utilizing organic and attached assets.

3. Staff plans mobility, counter-mobility, and survivability; nuclear, biological, and chemical support; air defense (AD) support; and combat service support supporting operations.

4. Brigade commander and staff conduct risk management.

5. Brigade commander and staff conduct back briefs and rehearsals to ensure that subordinates understand commander’s intent and concept.

6. Brigade executes the attack; masses all available combat power to destroy enemy in accordance with the commander’s intent.

7. Brigade consolidates and reorganizes as necessary.

8. Brigade continues operations as necessary.

Figure 3-4. Example brigade training objective
Levels of Training Objectives

3-16. There are four levels of training objectives:

- Collective unit
- Collective leader
- Individual leader
- Individual Soldier

Collective Unit

3-17. Training objectives at this level focus on the unit as a whole attaining training proficiency in the selected KCTs.

Collective Leader

3-18. Leaders at all levels and echelons interact not only as individual leaders, but as coherent groups working toward a unifying objective. Senior commanders and leaders consider the development of training objectives that focus on these groups. Typically these are staffs and command teams (company commander/First Sergeant), etc. How these groups work together and their effectiveness together and with other groups are crucial to mission accomplishment.

Individual Leader

3-19. Every leader learns the craft of leadership in each of the three training domains (operational, institutional and self-development). The operational domain is where individual leaders spend most of their careers and receive most of their professional development. Senior commander/leaders have the responsibility of developing their subordinate leaders, both at the collective and individual leader levels. Training objectives help identify those leader traits, characteristics and tactical/technical skills that these individuals should focus on.

Individual Soldier

3-20. NCOs train Soldiers, crews and small teams. Whether through individual Soldier tasks or Warrior Tasks and Battle Drills, NCOs have the responsibility to provide Soldiers with their individual training objectives. This provides a mechanism for the Soldier to improve or sustain these skills, knowledge, and behaviors as they progress through the ranks.

Apply the Command/Installation Time Management Cycle

3-21. At the installation level or below, time management cycles are created to protect training time for subordinate units. Time management cycles help units identify, focus, and protect prime time training periods and the resources needed to support unit training. This ensures
that subordinate organizations are able to concentrate on executing their UTP and stay mission-focused. In order to be effective, whatever time management cycle the unit establishes, commanders must enforce it throughout the unit. Senior commanders must ensure the planning and execution process is highly disciplined, and that all members of the command support and comply with prime time training. Without the support and oversight of the senior commanders, battalions, companies, platoons, and Soldiers will not be able to train to proficiency. Specific activities vary between installations according to the local situation and requirements. Time management cycles are depicted on UTP’s and supporting unit training calendars.

3-22. There are various types of time management cycles used throughout the Army. Whether the unit is an ARFORGEN-based unit, or non-ARFORGEN-based unit (TDA, etc), the commander, in coordination with the installation staff, coordinates the unit’s training requirements to protect prime-time training.

3-23. An example used throughout the Army is the Green-Amber-Red (GAR) cycle. Many units and installations employ this time management cycle, or some variation of it. The important point is that the commander employs the best method of time management cycle based on the installation and unit’s training requirements. The following are some examples of what occurs in a Green-Amber-Red time management cycle:

**Green:** The training focus of organizations in Green periods is multiechelon, collective training that leads to KCT proficiency. This period coincides with the availability of major training resources and key training facilities. Organizations in Green periods conduct planned training without distraction and external taskings. Examples:

- Training focus is primarily on collective tasks with individual and leader tasks integrated during multiechelon training.
- Maximum Soldier attendance at prime time, mission-essential training.
- Coincides with availability of major resources and key training facilities.
- Administrative and support requirements that keep personnel from participating in training are eliminated to the maximum extent possible.
- Leaves and passes are limited to the minimum essential.

**Amber:** The focus of units in Amber periods is on training proficiency at the individual, leader, crew, and squad levels. Individual self-development is maximized through the use of installation education centers and through distributed learning. Organizations in Amber periods are assigned support taskings beyond the capability of those units in the Red cycle, but commanders strive for minimal disruption to Amber organizations training programs. Examples:
• Small unit, crew, and individual training is emphasized.

• Provides time for soldier attendance at education and training courses.

• Some sub-organizations may be able to schedule collective training.

• Selected personnel are diverted to support requirements when all available personnel in organizations in Red period are completely committed to support requirements.

• Periodic maintenance services are scheduled.

**Red:** The training focus of units in the Red cycle is on maximizing self-development opportunities to improve leader and individual task proficiency. Units in Red cycle periods execute details and other administrative requirements and allow the maximum number of soldiers to take leave and individual, professional self-development courses. More often, post support requirements take priority. Commanders attempt to maintain unit integrity when executing administrative and support requirements. Maintaining unit integrity provides individual training opportunities for first line leaders. Examples:

• Diverts the maximum number of personnel to perform administrative and support requirements.

• Sub-organizations take advantage of all training opportunities to conduct individual, leader, and crew training.

• Support missions/details accomplished with unit integrity to exercise the chain of command and provide individual training opportunities for first line supervisors, as time permits. Unit taskings can be used to reduce the number of permanent special duty personnel within installations and communities.

• Leaves and passes are maximized. When appropriate, block leave may be scheduled.

• Routine medical, dental, and administrative appointments are coordinated and scheduled with installation support facilities.

![Image](image_url)

**Figure 3-5. Example time management cycle on a brigade training calendar**
Use a Backward Planning Approach

3-24. Backward planning is a simple technique whereby the planner begins at the commander’s visualized end-state for training. This is the point on the planning horizon that the unit expects to be fully trained and assessed a “T” in all KCTs. The Culminating Training Event (CTE) is the final event in which the unit demonstrates its ability to perform the assigned mission. Commanders start with the CTE at the chronological end-state for training; then, working backwards (complex to simple), place training events in line with higher headquarters events. The final event (CTE) should be near, or at the end of the planning horizon and before the unit begins the available stage of ARFORGEN, or at a point in time at the commander’s discretion.

![Figure 3-6. Example CTE posted on a brigade training calendar](image)

Use a Multiechelon Training Approach

3-25. COA development not only focuses on the KCTs which are directly tied to the mission, but is built around multiechelon training. The primary goal of each COA is about training the entire organization to KCT proficiency over time (planning horizon). Multiechelon training is described as a technique that allows for the simultaneous training of multiple echelons during a training event. Because of this, COA development does not focus on the internal tasks, or training that a single unit chooses to train. COA development from top to bottom, COA development creates a “cascading” effect, depicting only those training events subordinate units are required to participate in. For example, the inclusion of unit internal training events in a COA will visually consume all potential ‘white space’ on a planning calendar. This significantly limits the available training time for subordinate units to plan and develop their own COAs causing a “cluttered” effect at each succeeding echelon.

3-26. The following figures demonstrate the ‘cascading’ effect of building multiechelon events from the top echelon to the bottom. Each headquarters develops the multiechelon training events that focus on KCT proficiency, while preserving sufficient ‘white space’ for subordinates to train.
Figure 3-7. Example of a section of a brigade-level training calendar

<table>
<thead>
<tr>
<th>Time Management Cycle</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brigade</td>
<td>Amber</td>
<td>BDE</td>
<td>BDE</td>
<td>BDE</td>
</tr>
<tr>
<td></td>
<td>STAFFEX</td>
<td>BDE</td>
<td>BDE</td>
<td>CPX</td>
</tr>
<tr>
<td></td>
<td>COMMEX</td>
<td></td>
<td></td>
<td>WFX</td>
</tr>
</tbody>
</table>

Figure 3-8. The same calendar showing how a subordinate battalion includes the required brigade level events onto the battalion calendar while capitalizing on the available of ‘white space’ for its own training

<table>
<thead>
<tr>
<th>Time Management Cycle</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brigade</td>
<td>Amber</td>
<td>BDE</td>
<td>BDE</td>
<td>BDE</td>
</tr>
<tr>
<td></td>
<td>STAFFEX</td>
<td>BDE</td>
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<td></td>
<td>COMMEX</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st Battalion</td>
<td>BDE</td>
<td>BN</td>
<td>BDE</td>
<td>BDE</td>
</tr>
<tr>
<td></td>
<td>STAFFEX</td>
<td>COMMEX</td>
<td>CPX</td>
<td></td>
</tr>
<tr>
<td></td>
<td>COMMEX</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 3-9. The same calendar showing how a subordinate company incorporates required brigade and battalion-level training events into company events
3-27. Each succeeding headquarters should be cognizant of the effect that too many higher headquarters events has on subordinate unit planning as each develops COAs. A brigade that plans too many brigade-level multiechelon events leaves less ‘white space’ for the battalions to train, and ultimately even less time available for companies and platoons to plan and execute their training in support of the brigade.

3-28. Following the higher commander’s approval of the COA during the Training Briefing (see Section II), internal training events can and should be included on the unit training calendar (mandatory training, pre-deployment training, installation support, etc). This provides the unit a complete view of all unit training planned and scheduled. However, the first order of business in the creation of potential COAs and unit training calendar is to account for how the unit will achieve training proficiency to meet mission requirements.

**Use a Crawl-Walk-Run Methodology**

3-29. COAs sequence training events in a progressive manner order to build KCT proficiency over the planning horizon. This “crawl-walk-run” methodology initially focuses on simple crew-team training events, and then progressively advances to increasingly more complex unit-level collective training events. The TSs in CATS indicate whether a training event is a crawl, walk or run level event.
Figure 3-11. Craw-Walk-Run activities, Soldier and leader/trainer

Consider Live, Virtual, Constructive and Gaming (LVC-G) Training Support

3-30. How training events are executed is an important consideration as COAs are developed. Ideally, with unlimited time and resources, all unit training is best executed when done in a live environment. However, this is not reality due to limited time and resources. Commanders must be able to leverage all the training support enablers available to get the best balance of the events that can be done live, and those events that can and should be done in virtual, or constructive training environments, all the while remaining focused on KCT proficiency.

3-31. Because of time and resource considerations, the Army relies on a creative mix of live, virtual, constructive, and gaming training enablers to provide realistic training. Live, virtual, and constructive training is a broad taxonomy that covers the degree to which a training event uses simulations. For example, field training exercises, live fire exercises, deployment
exercises, and battle drills under live conditions replicate an actual operational environment as closely as possible.

3-32. Virtual, constructive, and gaming training enablers are used to supplement, enhance, and complement live training. They can help raise the entry level of proficiency for live training and reduce the time needed to prepare training. They can also provide a variety of training environments, allowing multiple scenarios to be replicated under different conditions. Based on training objectives and available resources—such as time, ammunition, simulations, and range availability—commanders determine the right mix and frequency of live, virtual, and constructive training to ensure organizations use resources efficiently. Definitions:

**Live** training is training executed in field conditions using tactical equipment. It involves real people operating real systems. Live training may be enhanced by Training Aids, Devices, Simulators, Simulations (TADSS) and tactical engagement simulation to simulate combat conditions.

**Virtual** training is executed using computer-generated battlefields in simulators with the approximate characteristics of tactical weapon systems and vehicles. Virtual training is used to exercise motor control, decisionmaking, and communication skills. Sometimes called “human-in-the-loop training,” it involves real people operating simulated systems. People being trained practice the skills needed to operate actual equipment, for example, flying an aircraft.

**Constructive** training uses computer models and simulations to exercise command and staff functions. It involves simulated people operating simulated systems. Constructive training can be conducted by units from platoon through echelons above corps.

**Gaming** is the use of technology employing commercial or government off-the-shelf, multi-genre games in a realistic, semi-immersive environment to support education and training. The military uses gaming technologies to create capabilities to help train individuals and organizations. Gaming can enable individual, collective, and multiechelon training. Gaming can operate in a stand-alone environment or be integrated with live, virtual, or constructive enablers.

3-33. Consider employing each environment independently (the easiest to plan and prepare), or a combination of two or more environments may be used to meet the training objective. If using more than one training environment, leaders may use either a Blended Training Environment (BTE) or an Integrated Training Environment (ITE), depending on where the installation is in the ITE fielding schedule.

**Blended Training Environment (BTE)**

3-34. A BTE event is accomplished using mission command systems to facilitate training using more than one type of enabler. However, the enablers are not integrated and synchronized. They require high overhead in terms of personnel to make the simulations and mission command systems (MCS) communicate with each other. The terrain databases in the MCS and TADSS are not correlated, which means that, without some workarounds, a kill in a constructive simulation may be seen as a miss in the virtual simulator. Blended training can provide the complex training environment necessary to develop agile, adaptive leaders and versatile units but it takes more resources than the ITE needs.
**Integrated Training Environment (ITE)**

3-35. An ITE event uses consistent (common TADSS enablers across installations) and persistent (24x7 availability) live, virtual, and constructive enablers to stimulate mission command systems (MCS) using correlated terrain databases in MCS and the TADSS and the Live, Virtual, Constructive – Integrating Architecture (LVC-IA). LVC-IA is the architecture (standards, protocols, hardware and software) which enables seamless, synchronized integration among MCS and the simulations/simulators.

3-36. All training requires some form of training support—TADSS, facilities, services, ranges, maneuver space, etc. Planning and preparing BTE and ITE are more complex than conducting simple maneuver or movement training. However, BTE and ITE events enable units to increase training value with fewer resources. They also enable tailoring the conditions in various levels of complexity to make the training more challenging, as well as enabling a quick turn-around in re-training with relatively low cost.

3-37. CATS events will often provide a variety of live, virtual or constructive options from which to choose to train task selections and collective tasks. For example, there will often be a “walk” level event such as an STX virtual event and a similar STX live event for “walk/run” level training.

3-38. Just as leaders must understand the operational environment in combat, a leader early on must understand the training environment at home station or wherever the unit is training. That means the leader must early in his/her tenure, talk to the right people (e.g., DPTMS, Range Control, MTC staff) and visit the right facilities (e.g., ranges, maneuver/movement space) and then take the unit’s leaders on a terrain walk of those capabilities.

3-39. The diagram below depicts the different training enablers and how they may be mixed at different echelons in relation to the event level of training. For more information on the BTE and ITE, go to the [ITE and Blended Training Best Practices](#) page on ATN.

![Live, Virtual, and Constructive Training Mix](image)

*Figure 3-13. Example LVC training mix from brigade to individual Soldier*
Live (L) – Training executed in field conditions using tactical equipment enhanced by training aids, devices, simulators, and simulations (TADSS) and tactical engagement simulation to simulate combat conditions.

Virtual (V) – Training executed using computer-generated battlefields in simulators with approximate characteristics of tactical weapons systems and vehicles. Virtual tactical engagement simulation training permits units to maneuver over much larger areas.

Constructive (C) – Training that uses computer models and simulations to exercise the command and staff functions of units from platoon through echelons above corps.

Replicate the Operational Environment (OE)

3-40. As much as possible, commanders and leaders at all echelons make the training environment as close to the anticipated operational environment as possible. As training events are selected, planners consider the resources that may be required to replicate the OE. Replicating this environment will require resources, whether it includes “VISMODs” (visually modified) equipment, “OPFOR” (opposing force) personnel, additional classes of supply, etc. Identifying these resource requirements early on will help create the right training conditions to make the training as realistic and challenging as possible. “Train as you will fight” (training principle) should be a central planning consideration for every training event whether it is a multiechelon event, or a series of classes. Often, a combination of live, virtual, constructive, and gaming training enablers can help make the training environment approximate an actual operational environment. Identifying additional training resources in order to replicate the OE is an important part of the planning process.

Conclusion

3-41. Section I has provided some of the primary planning considerations leaders and planners should consider before developing a training COA. Failure to take these into account may result in incomplete planning or COAs that are not realistically executable. Section II will walk the planning through the development of a COA, taking into account the ideas and concepts discussed in Section I.

Additional Supporting Resources (also see the UTM page on ATN)

ATN page Integrated Training Environment (ITE)
Section II
Courses of Action (COA)

Introduction

3-42. According to the Commander and Staff Officer Guide (ATTP 5-0.1), “a COA is a broad potential solution to an identified problem.” MDMP generates options for analysis and comparison that satisfy the commander’s intent and planning guidance for training the unit. In developing COA options for the commander, planners apply the following criteria for each proposed COA. Each COA should be:

- Feasible—doable
- Acceptable—benefit is worth the cost
- Suitable—appropriate
- Distinguishable—not similar to another COA
- Complete—no clear gaps

3-43. When developing a COA under conditions of limited training time and resources, many units develop a single COA that meet the commander’s intent and planning guidance, rather than develop multiple COAs for the commander’s consideration.

3-44. In determining a training COA using MDMP, there are four distinct steps. These are:

<table>
<thead>
<tr>
<th>Key Inputs</th>
<th>Steps</th>
<th>Key Outputs</th>
</tr>
</thead>
</table>
| • Concurrence for:  
  - Approved KCTs  
  - Unique/scarc resources  
  - Training risk  
  - Training readiness issues | Step 3  
Course of Action (COA) Development | • Training events that train the KCTs  
• Develop multiple COAs |
| • Several viable COAs | Step 4  
COA Analysis (War Game) | • Narrow viable COAs to those 2-3 that most effectively train the unit in the time available |
| • 2-3 viable COAs | Step 5  
COA Comparison | • Unit Cdr selects most viable, supportable COA to brief higher Cdr |
| • Unit Cdr selected COA | Step 6  
COA Approval (Training Briefing) | • COA approved by higher Cdr |

Figure 3-14. Steps 3-6 of MDMP as applied to developing a unit plan to train
Step 3 – COA Development

3-45. When it has been decided which events the unit will train and the recommended frequency of each, the staff can begin to chronologically sequence/arrange those events on a base training calendar (depiction of the planning horizon). The planning concepts and considerations discussed in Section I guide the planner through this process. The calendar provides a visual representation of the developing training COA. The calendar is also invaluable to subordinate units who can visually identify not only the higher HQ multiechelon training events they must participate in, but also visually identifies the available “white space” they can schedule their own unit training.

3-46. Planners start by placing all multiechelon training events directed by their higher headquarters on the calendar to include the higher unit’s CTE (CTC rotation, BDE FTX, etc). Next, overlay any time management cycles the higher headquarters directs. Then using backward planning, apply each training event on the calendar remembering to provide “white space” for their subordinate units to schedule training. Commanders should focus on and only apply multiechelon events that apply to their entire formation to their training calendars at this stage of planning. Multiechelon training maximizes resources and time by training multiple units on multiple tasks simultaneously and provides the commander opportunities to assess his subordinate units’ current proficiency in the selected KCTs.

3-47. The object is not to account for every lower-level crawl and walk event (such as company-level classes, etc), unless all subordinate units are expected to attend. Taking into account the planning horizon (time to train), time management cycles (e.g., red-amber-green), higher headquarters training events, etc, the commander and staff begin to lay out the training COA against the time available to train. Because this first stage of training calendar development includes only the major training events requiring subordinate unit participation, it will not appear over populated with events and other requirements. This cascading effect ensures that sufficient “white space” is available for subordinate units to plan their own training. Examples might include:

- Culminating Training Event (CTE) (e.g., CTC rotations)
- MAPEX, TEWT, CPX, FCX, CALFEX, FTX, etc
- Gunnery periods

Step 4 - COA Analysis Process (war-game)

3-48. Once planners have developed several potential training COAs (the events, frequencies and sequence), these should be analyzed. The primary purpose of COA analysis is to determine resources, de-conflict training events and synchronize the COA. Identification of major resources that may require immediate coordination and/or help from higher headquarters to secure is important to prevent future training shortfalls. These adjustments may require decision points for the commander or adjustments to the events and their sequencing.
3-49. Consider major resources, for example:

- Land, facilities, ranges
- Ammo, TADSS and other major resources
- OPFOR, role players, Master Scenario Events Lists
- Resources not readily available at home station
- Unit availability (Red-Amber-Green) (Reset, TR1, TR2, Available)

3-50. Also for consideration:

- Training Objectives (can they be met based the COA?)
- Information requirements – (what are the decisions the commander needs to make and when – Decision Points (DP)?)
- Supporting Warfighting Functions (WfF) (Coordination or additional resource considerations)
- Mission Command (positioning of leaders for evaluation and training event control)
- Operational Environment (OE) (is the replication accurate? Complete? Can resources be coordinated and made available when needed?)

3-51. Commanders and staffs can also use the CATS events viewer on ATN to gather information (see CATS tutorial).

**Step 5 - COA Comparison**

3-52. COA comparison is an objective process to evaluate COAs independently and against set evaluation criteria approved by the commander and staff. The goal is to identify the strengths and weaknesses of COAs, enable selecting a COA with the highest probability of success, and further developing it in an OPLAN or OPORD. The commander and staff perform certain actions and processes that lead to the key outputs in Figure 3-15.
Conduct Advantages and Disadvantages Analysis

3-53. The COA comparison starts with all staff members analyzing and evaluating the advantages and disadvantages of each COA from their perspectives. Staff members each present their findings for the others’ consideration. Using the evaluation criteria developed before the war-game, the staff outlines each COA, highlighting its advantages and disadvantages. Comparing the strengths and weaknesses of the COAs identifies their advantages and disadvantages with respect to each other.

Course of Action Advantages/Disadvantages

3-54. The following is an example of the planning considerations as applied to developing and comparing different COAs:

**COA 1**

Training events are logically sequenced leading up to the CTE at the end of the planning horizon. Between these events, there are sufficient periods of ‘white space’ for subordinate units two levels down to program their own unit training. It is known that the local Multi-Purpose Range Complex (MPRC) will not be available during the unit’s ‘green’ cycle for table VIII gunnery. This alone will significantly impact the unit’s ability to be fully trained by the end of the planning horizon.

**COA 2**

This COA is well synchronized with the installation’s red-amber-green cycle ensuring maximum resources, ranges and facilities are available for most of the unit’s amber and green cycles. There appears to be too many brigade-level multiechelon training events programmed which will negatively impact allocations of ‘white space’ down to subordinate units.
Compare Courses of Action

3-55. Comparison of COAs is critical. The staff uses any technique that helps develop those key outputs and recommendations and assists the commander to make the best decision. A common technique is the decision matrix. This matrix uses evaluation criteria developed during mission analysis and refined during COA development to help assess the effectiveness and efficiency of each COA. (See Figure 3-17)

**Figure 3-17. Sample decision matrix**

3-56. The decision matrix is a tool to compare and evaluate COAs thoroughly and logically. However, the process is also based on subjective judgments that may change during the course of evaluation. In Figure 3-17, values reflect the relative advantages or disadvantages of each criterion for each COA as initially estimated by a COS (XO) during mission analysis. At the same time, the COS (XO) determines weights for each criterion based on a subjective determination of their relative value. The lower values signify a more favorable advantage, such as the lower the number, the more favorable the score.
3-57. After comparing COAs and assigning values, the staff adds and totals the un-weighted assigned scores in each column vertically under each COA. The staff multiplies the same values by the weighted score associated with each criterion and notes the product in parenthesis in each appropriate box. They add these weighted products vertically and note in parenthesis in the space for “Weighted TOTAL” below each COA column. Then the staff compare the totals to determine the “best” (lowest number) COA based on both criteria alone and then on weighted scores.

3-58. Although the lowest value denotes a “best” solution, the process for estimating relative values assigned to criterion and weighting is highly subjective. The “best” COA may not be supportable without additional resources. This result enables the decision maker to decide whether to pursue additional support, alter the COA in some way, or determine that it is not feasible.

3-59. The decision matrix is a very structured and effective method used to compare COAs against criteria that when met, suggest a likelihood of producing success. Staff officers give specific broad categories of COA characteristics a basic numerical value based on evaluation criteria. They assign weights based on subjective judgment regarding their relative importance to existing circumstances. Then they multiply basic values by the weight to yield a given criterion’s final score. A staff member then totals all scores to compare COAs.

3-60. Commanders and staffs cannot rely solely on the outcome of a decision matrix, as it only provides a partial basis for a solution. During the decision matrix process, planners carefully avoid reaching conclusions from mainly subjective judgments from purely quantifiable analysis. Comparing and evaluating COAs by category of criterion is probably more useful than merely comparing total scores.

3-61. The staff compares feasible COAs to identify the one with the highest probability of success (KCT attainment within the planning horizon). The selected COA should also:

- Include the higher HQ multiechelon events the unit will participate in.
- Provide as much ‘white space’ as possible to subordinate units.
- Logically and progressively (crawl-walk-run) the unit to the CTE.
- Consider the availability/non-availability of required training resources to include facilities and land.
- Provide the most flexibility to meet unexpected changes to the training mission.

3-62. After completing its analysis and comparison, the staff identifies its preferred COA and makes a recommendation. If the staff cannot reach a decision, the COS (XO) decides which COA to recommend.
COA Decision Briefing

3-63. Once a COA is recommended for execution, the staff then delivers a decision briefing to the commander. The COS (XO) highlights any changes to each COA resulting from the war-game. The decision briefing includes:

- The commander’s training intent of the higher and next higher commanders.

- The training status of the entire unit (all subordinates).

- The current status of the KCTs (T-P-U).

- The COAs considered, including:
  - Assumptions used.
  - Results of running estimates.

- A summary of the war-game for each COA, including critical events (planning horizon, Decision Points (DP), availability of important training facilities and resources, etc) modifications to any COA, and war-game results.

- Advantages and disadvantages (including risks) of each COA.

- The recommended COA. If a significant disagreement exists, then the staff should inform the commander and, if necessary, discuss the disagreement.

Step 6 - COA Approval

3-64. At the conclusion of the decision briefing, the commander with the advice of the staff, XO/CoS and CSM/1SG determines which COA the to be briefed at the Training Briefing (TB). At this stage in the COA development process, the selected COA is still not approved for execution until it is presented to and approved by the higher commander.

Training Briefing (TB)

3-65. Once the unit commander selects the COA it is prepared for briefing to the commander two levels above. Battalion commanders brief the division commander and company commanders brief the brigade commander. Battalion commanders in separate brigades and regiments present the TB to corps major subordinate commanders. The TB (Yearly Training Briefing (YTB)) for RC units is normally presented to the higher commander. Separate RC
battalion commanders and company commanders may also brief the next higher mission commander.

3-66. This initial training briefing covers the selected COA and focuses on how the unit will train the KCTs to proficiency. The training briefing results in a contract between commanders. The unit commander agrees to train as described in the plan, and the commander two levels above approves the plan and agrees to protect it, and provide the resources to execute it. This shared responsibility helps clarify training responsibilities, achieve unity of effort, and synchronize actions to achieve quality training and efficient resourcing. Upon completion of the initial training briefing and plan approval, the briefing unit issues the UTP OPORD to its subordinate units.

3-67. The commander two levels above determines the frequency of subsequent training briefings. These are conducted throughout the life of the Unit Training Plan (UTP) and at intervals at the commander’s discretion. Quarterly Training Briefings (QTB), or Yearly Training Briefings (YTB) may make sense in the execution of the UTP for many units, but a different frequency may be more appropriate. The effort to plan, coordinate and execute these conferences is manpower and time intensive and should be considered in determining frequency. Another consideration for the frequency of TBs is when local, home station resource conferences are scheduled. Because these important, periodic meetings are key to the unit obtaining and scheduling necessary training facilities and resources, TBs should be synchronized with them.

3-68. The commander two levels above coordinates the briefing early enough to ensure that resources can be locked-in for the training unit and also determines the timing, format, and topics of the briefing. The commander and CSM/1SG personally present the overview of the UTP. The higher commander also agrees to minimize subordinate unit exposure to unscheduled taskings and un-programmed requirements and IAW any time management cycles (red-green-amber) in place.

3-69. The training briefing format should be flexible enough to allow subordinate commanders and CSM/1SGs to highlight their unit strengths, weaknesses, initiatives, and priorities. The format for all training briefings follows the outline of the to-be-published UTP OPORD in content and context. The training briefing focuses on, but is not limited to the following topic areas:

- Higher headquarters mission
- Operational Environment (OE) (use Political, Military, Economic, Social, Infrastructure, Information, Physical Environment, and Time (PMESII-PT))
- Unit mission
- Key Collective Tasks (KCT)
- Commander’s intent
- Concept of the Operations
- Decisive Operations (COA)
- Shaping Operations #1 (individual training)
- Shaping Operations #2 (leader development)
- Key training events
- Time management cycle
- Tasks to subordinate units
- Assessment plan
- Key resources required
- Training risk (time/resources to train)
- Training challenges

3-70. During the briefing, the CSM/1SG provides analysis of the unit’s individual Soldier training proficiency/mastery. This is done in the training topic:

- Concept of the Operations
  - Decisive Operation (collective training strategy)
  - **Shaping Operation #1 (individual training)**
  - Shaping Operation #2 (leader development)

3-71. CSM/1SG briefs the current and projected status of:

- The unit’s individual through section training
- Tasks that are nested with the unit’s collective tasks
- MOS training
- NCOES (Warrior Leadership Course (WLC), Advanced Leader Course (ALC), etc)
- Low Density MOS training

3-72. Other unit leaders who are not briefing (e.g., commanders, CSM/1SGs, and key staff) normally attend sister unit training briefs to gain insights into training priorities and to enhance collaborative planning efforts. Home station and installation representatives attend these briefings to ensure home station and installation training resources are available and properly coordinated. If the unit is mission-resourced from another higher unit, the providing unit commander should also be present.
Conclusion

3-73. Once the higher commander approves the COA to train, the staff can begin the process of developing and publishing the Unit Training Plan (UTP) to all subordinate units.

Additional Supporting Resources (also see the UTM page on ATN)

Tutorial  Develop a UTP COA
Tutorial  Develop a UTP COA using the CATS Unit Training Planner (UTP)
Video    Training Briefings
Example  Training Briefing
Section III
Unit Training Plan (UTP)

Introduction

3-74. Once the higher commander approves the COA at the training briefing, the approved COA ultimately becomes the UTP. The staff begins to organize the COA along with the guidance given by the higher commander and all additional clarifying information into a five paragraph field order. When completed, it is communicated to subordinate and higher units as appropriate and posted to DTMS.

Step 7 – Orders Production

3-75. The following is an example format for a UTP OPORD:

Copy ## of # copies
Headquarters, 1 Battalion, XX Armor
Place of issue
Date-time group of signature

OPORD # (Code Name)

(U) References: List documents essential to understanding the OPORD (ex. higher headquarters directives, OPORDs, ADRP 7-0, Unit Training Management (UTM), Combined Arms Training Strategies (CATS), Army Training Network (ATN), Digital Training Management System (DTMS), HQ DA Standardized METL, etc.)

(U) Time Zone Used Throughout the OPLAN/OPORD: (Optional).

(U) Task Organization: Refer to Annex A.

1. (U) Situation. The situation paragraph describes the conditions and circumstances of the operational environment that the unit must train for.
   a. (U) Training Environment. Use the operational variables of PMESII-PT to describe the environment at battalion and above and METT-TC at company and below (two useful resources for the operational variables are ADRP 3-0 and TC 7-101):

   (1) (U) Political
   (2) (U) Military
   (3) (U) Economic
   (4) (U) Social
   (5) (U) Information
   (6) (U) Infrastructure
(7) (U) Physical Environment
(8) (U) Time

b. (U) Friendly Forces. Briefly identify and state the mission, commander’s intent and KCTs for the higher headquarters.

c. (U) Training Risk, Challenges and Resources. List any significant training risks and challenges (to include difficult to obtain resources or assets required to execute the planned training) identified during planning. Describe any approved mitigating measures. This is not personnel safety risk.

d. (U) Assumptions. List any significant assumptions used for UTP development; for example:

(1) Key challenges to training readiness
(2) Scarce or unique resources required to train
(3) Estimated training time to achieve task proficiency

2. (U) Mission. State the unit’s mission – a short description of the, who, what (task), when, where, and why (purpose) that clearly indicates the action to be taken and the reason for doing so (always include the KCTs in the mission statement, as they are the essential tasks to be trained).

Example Mission Statement: NLT 020400OCT15, 1-32 CAB trains at Fort Custer in a Decisive Action Training Environment (DATE) to achieve proficiency in selected KCTs; Conduct MTC, Conduct an Attack, and Conduct a Defense IOT deploy NET 02OCT16 to conduct operations.

3. (U) Execution.

e. (U) Commander’s Intent. Provide brief commander’s intent statement to include key collective tasks (KCT) (the commander’s intent is a clear and concise statement of the tasks’ proficiency and leader traits/skills that the unit must achieve IOT successfully conduct operations in the anticipated operational environment. It succinctly describes what constitutes the success of the training plan and provides the purpose and conditions that define that desired end-state).

f. (U) Concept of Operations. The concept of operations is a statement that directs the manner in which subordinate units cooperate to obtaining KCT proficiency and leader development (the concept establishes the sequence of actions and training events that the force will use to achieve the commander’s training end-state. It is normally expressed in terms of decisive, shaping, and sustaining operations. The unit training calendar helps portray the concept of operations and is located in Annex C Operations).

(1) (U) Decisive Operations (Collective Training). Describe the collective training plan that units will use to achieve key collective task (KCT) proficiency. Refer to Annex C for the training focus for each training event on the calendar.

(2) (U) Shaping Operation #1 (Individual Training). Describe the individual training plan and how it supports the achievement of KCT proficiency. Refer to Annex D for
specific tasks.

(3) (U) **Shaping Operation #2 (Leader Development).** Describe the unit’s leader development plan. Include leader certification, skills required to support the unit KCTs, OPD and NCOPD programs. Refer to Annex E for specific tasks.

g. (U) **Assessment.** Describe how the commander plans to assess training, key collective task proficiency and leader development (may also require an annex or appendix).

h. (U) **Tasks to Subordinate Units.** State the task assigned to each unit that reports directly to the headquarters issuing the order.

i. (U) **Coordinating Instructions.** List instruction and tasks applicable to two or more units not covered in the units training SOPs.

(1) (U) **Timing.** State the time or condition when the OPORD becomes effective and list the operational timeline.

(2) (U) **Training Friendly Force Information Requirements.** Commander’s plan to address key challenges to training.

(3) (U) **Other Coordinating Instructions.** List additional coordinating instructions and tasks that apply to two or more units.

4. (U) **Sustainment.** Describe the concept of sustainment, including priorities of sustainment by unit. Include installation requirements not included in SOPs.

5. (U) **Command and Signal.** Include any changes from steady state (garrison) operations or state “no change”.

ACKNOWLEDGE:

[Commander’s last name]
[Commander’s rank]

OFFICIAL:

[Authenticator’s name]
[Authenticator’s position]

ANNEXES:
A – Task Organization
B – Training Environment
C – Collective Training Plan
   App 1 – Collective Training Event Calendar (overlaid on the higher unit/installation time
   management cycle)
   App 2 – Collective Training Event Objectives
D – Individual Training Plan
E – Leader Development Plan

DISTRIBUTION: A (example only)

Changes/Updates to the UTP

3-76. During the course of executing the UTP, changes to the base plan may be necessary as
directed by the commander. These are communicated to subordinates using Fragmentary
Orders (FRAGOs) that refer to the base UTP OPORD.

3-77. The next step in the UTM process is to further develop each of the training events that
comprise the UTP and employ the operations process of plan-prepare-execute-assess each
training event to accomplish training the KCTs to proficiency.

3-78. Note, once the UTP and attached training calendar has been published - internal
training events can and should be included on the unit training calendar (mandatory training,
pre-deployment training, installation support, etc). This provides the unit a complete view of all
unit training planned and scheduled. However, the first order of business in the creation of the
UTP and unit training calendar, is to account for how the unit will achieve training proficiency
to meet mission requirements.

Command Training Guidance (CTG)

3-79. The UTP is the primary mechanism the commander uses to communicate how the unit
will train during the planning horizon. At the commander’s discretion, he may choose to
communicate his training philosophy or other training related items via an additional document
called Command Training Guidance (CTG). Historically, many units publish the CTG annually,
but the frequency of publication is at the discretion of the commander. It does not replace the
UTP, which is the commander’s primary vehicle for directing unit training execution.

Additional Supporting Resources (also see the UTM page on ATN)

Video       Unit Training Plan (UTP)
Example     Unit Training Plan (UTP) OPORD
Video       Training Briefings
Link  Commander's Guide to Leader Development

Example  Leader Development Plan Annex E to UTP OPORD
Chapter 4
Plan and Conduct Training
(Plan-Prepare-Execute-Assess)

Once the UTP is communicated to subordinates, the detailed work of planning and conducting each training events begins. Within the operations construct of plan-prepare-execute-assess are key processes that ensure the UTP progresses toward KCT proficiency. Commanders and leaders at all levels work in mutual support of each other in order to provide the right training that leads to mission success.

Introduction

4-1. The UTP is the unit’s over-arching plan to attain KCT proficiency. Every training event is led and managed through the operations process (plan-prepare-execute-assess). They are planned and coordinated in detail well before execution to ensure the KCTs and training objectives are synchronized. Weekly training meetings held at the company-level and higher provide the primary forum to ensure coordination and planning is on track.

4-2. The “T-Week” concept helps by providing a sequential framework that ensures all critical actions are completed before and after the training event is conducted. This process has to start early enough in the planning cycle to ensure all resources required to train are present and accounted for as training begins. Unless this is done, the KCT proficiencies that the commander envisioned will not be met. Additionally, commanders and leaders must have a deep understanding of the home station training resources and facilities that are available.

4-3. Resource coordination, rehearsals and pre-combat checks before training begins are critical to success – just as they are when the unit is operating. The time to re-train and re-try tasks as training occurs is also extremely important. In many instances, it is rare that a unit will flawlessly execute a series of tasks during training without the need to re-train them. If the unit/individual fails to meet the training objectives for a specific training event, the unit must have allocated time to ensure that the task(s) can be re-tried successfully before the event is concluded, and definitely before the unit moves on to more complex collective tasks.

Plan-Prepare-Execute-Assess Every Training Event

4-4. Commanders and all unit leaders use the operations process (see figure 4-1) as they begin to plan and execute each of the training events that comprise the UTP. Planning training events is no different than planning an operation. The commander’s, as well as that of unit leaders, physical presence and participation at training is essential. It sends the message that training is important to the success of the unit. Resource planning and coordination are also vitally important; without the right resources available at the right time, meaningful and effective training will not occur and valuable, irreplaceable training time will be lost. Assessment of task and leader proficiency is a constant process as units plan and train.
Evaluations of task performance and bottom-up feedback are key because they provide the commander the information necessary to make accurate and timely KCT assessments.

Figure 4-1. The operations process

Where to Start

4-5. The UTP identifies the training events crucial to attaining KCT proficiency, it is also the starting point for leaders to begin to assign planning responsibility and begin the process of determining and coordinating resources. The focus is on the multiechelon training events that train unit collective tasks (e.g., STAFFEX, CPX, LFX, and FTX). These are the training events that will require substantial resources, coordination and facilities. Training events such as unit-conducted classes and those that are supported primarily with internal unit-provided resources and coordination are not typically included on the UTP training calendar, but should also follow the plan-prepare-execute-assess construct.

Training Meetings (see also appendix E and, The Leader’s Guide to Company Training Meetings)

4-6. Training meetings provide the venue for the commander and unit leaders to periodically ensure daily training event planning and coordination are on track. As the unit executes the UTP, training meetings are conducted by companies, normally once a week, as a minimum. Battalions and brigades conduct training meetings, but these are focused primarily on overall UTP progress and ensuring that resources for subordinate units are coordinated within the command and at the installation level. These meetings are the “glue” that keeps the UTP on track. Training meetings also provide a forum for the commander to track and assess UTP progress and direct modifications to the plan, as needed.
Training Meeting Goals

4-7. Training meetings have four goals:

1. Validate the tasks (collective and individual) to train for future training events. The commander modifies and updates the tasks to train to meet UTP training objectives.

2. Verify the KCTs being trained that support the unit mission and are scheduled for training. Confirm training objectives, resource requirements and the status of coordination.

3. Ensure cross-communication among leaders.
   - Subordinate leaders provide assessments of proficiency after each training event.
   - Ensure tasks trained at platoon, squad and individual level are executed and assessed to standard and support the tasks the company must train.
   - Training meetings are the key to keeping the unit training plan (UTP) on course.
     - They are non-negotiable, and provide the commander and leaders visibility of the current state of unit training readiness. Accordingly, they appear on the weekly training schedule.
     - Training meetings facilitate the top down/bottom-up flow of information.
     - Training meetings are a mechanism that commanders use to manage training events week-by-week and ensure the unit stays on course to attain training goals and collective task proficiency.
Training meetings are formalized for company and above.

Their focus is predominantly on resourcing and supporting company-level training.

The presentations and discussions focus only on the UTP and not on unit administrative subjects (like awards, OER/NCOER status, school allocations, etc).

- Subordinates provide their assessments regarding the training proficiency needs of the unit and individual Soldiers. Training meetings are conducted by leaders to review past training, identify and plan necessary retraining, plan and prepare future training, and exchange timely training information between leaders.

- Feedback is an important aspect of training meetings and is used to refine the UTP as it progresses. This feedback takes many forms, for example, personal observation, after-action reviews, and informal evaluations. The training meeting is a primary forum for the discussion of training assessments (unit, leader and task proficiency).

4. Review the training focus for upcoming events.

![Figure 4-3. Cycle of training events and training meetings ensure the UTP remains on-track](image)

**Training Models**

4-8. “Training models” are developed and used by units as a simple planning and execution tool for managing individual training events. A good example of a widely used and popular training model is the “eight-step training model”. Many units have expanded on this idea, adding additional steps and processes as a guide to help junior leaders to prepare and execute training events. The steps of the eight-step training model follow:

1. Plan the Training

2. Train & Certify Leaders

3. Recon the Training Site

4. Issue the OPORD
5. Rehearse

6. Execute the Training

7. Conduct an AAR

8. Retrain/Retry

4-9. Although training models provide a useful home station resource to follow, they are not the planning and execution processes used by the Army in operations. In fact, there is little difference between the eight-step training model and the steps of TLP. The definitive reference for MDMP and TLP is ATTP 5-0.1, Commander and Staff Officer Guide, chapter 4. Chapter 3 of ADRP 7-0 also provides guidance on how MDMP is used to develop both the UTP and plan for individual training events.

**T-Week Concept**

**A Backward Planning Method**

4-10. The T-Week concept provides a framework and a backward planning method that provides specific considerations for the planning and coordination necessary for each training event. The T-Week concept helps ensure that all significant actions necessary to execute training events are considered and completed in a timely manner. Although the following description is extensive, it does not take into account each unit or installation’s particular requirements for planning and coordination. The structure of the unit T-Week should be customized to meet specific unit requirements and should become a standard part of the unit training SOP. Additionally, the T-Week concept is not a substitute for the detailed planning required through MDMP or TLP.

4-11. The following is a breakdown of major “T-Week” activities to use as a guide for units to follow in the development of training events. Keep in mind that each major training event would fall into the T-Week concept at different points in time on the training calendar.

**T-Week Concept**

<table>
<thead>
<tr>
<th>UTP Approval</th>
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<tbody>
<tr>
<td>Week T-21 to T-13</td>
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<tr>
<td>Week T-12</td>
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<td>Week T-11</td>
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<td>Week T-10</td>
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<td>T-1</td>
</tr>
<tr>
<td>T-Week</td>
</tr>
<tr>
<td>T+1</td>
</tr>
</tbody>
</table>

4-12. The anchor point for the T-Week concept is the week training is planned for execution. This is designated as “T-Week”. A minus sign (-) indicates the number of weeks prior to a particular training event. For example, T-5 would be five weeks before the training event occurs. A plus sign (+) indicates the number of weeks following the event, for example, T+1.

**Reserve Component Considerations**

4-13. USAR and ARNG units operate in a monthly cycle, so the Active Component T-Week construct may not work as well for these units. A monthly concept may be necessary to consolidate weeks into months. This idea is used by many Reserve Component units to help leaders and training managers manage resources and coordinate for specific events that support the Unit Training Plan (UTP). A revised T-week schedule is developed and facilitates the focus of the monthly training meeting. “Training-months” are the months before and after the execution of a training event. For example, T-12 is twelve months from event execution. T+1 represents the month following a training event.

4-14. The remainder of this chapter is a detailed description of the supporting activities that take place during the T-Weeks. Reserve and ARNG units only need to replace T-Week activities with the corresponding month.

**From UTP Approval to Beginning the T-Week Countdown**

4-15. For most units, the time from UTP approval to beginning the backwards planning of the T-Week concept varies. In fact, for many Reserve Component units the requirement to begin and plan initial UTP training events could be years.
NOTE: The following pages of the T-Week concept are arranged for the user to print as a useful planning guide. Reserve Component units should aggregate activities based on their monthly schedule and approved UTP.

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T-21 to T-13
Identify Major Training Facilities

4-16. As the UTP is developed, and as training events are planned, major facilities/resources are identified and earmarked for use. This ensures the facilities are scheduled and locks the unit in for their use. As the plan is refined, it may be necessary to cancel or modify events, enabling other units to use the facilities as necessary. Installations or divisions and corps usually have periodic scheduling conferences to lock in major facilities. These conferences may be quarterly, semi-annual and/or annual. They provide all units on the installation visibility of facility usage and also opportunities when they are available for unit scheduling. Examples of these kinds of facilities include ranges, gunnery complexes, MOUT sites, obstacle courses, simulation centers, rail spurs, airfield support centers, air load trainers, etc.

Additional Supporting Resources (also see the UTM page on ATN)

Tutorial Training Resource Considerations
Tutorial Training Resources in CATS
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T-12
Conduct Training Event Mission Analysis

4-17. Gathering the information required to conduct training event planning is critical to developing successful events. Examples include: historical information such as AARs, inspection results, operations orders, troop lists, etc. Use these types of documents to begin mission analysis. Historical information provides the start point to shape future planning and as a start point for training assessment analysis.

Conduct Training Event Mission Analysis

4-18. Commanders refer back to the approved UTP to re-confirm the KCTs and training objectives selected to train for each particular training event. Each training event requires a high degree of planning and coordination weeks in advance of execution. This mission analysis ensures that the training event and the correct KCTs that were aligned in the UTP are accounted for as planning the training event begins.

Identify Prerequisite Training

4-19. Prerequisite training is best defined as any training that must be completed and/or mastered prior to beginning the planned training event. Prerequisite events can be any level event (classroom instruction, TEWTs, STXs, FTXs, CPXs, etc) and are usually required at each progressive level of training difficulty. Commanders determine which events are prerequisites and ensure they are completed to standard prior to beginning the next training event in the UTP. The Combined Arms Training Strategies (CATS) is the primary resource to view the proponent recommended prerequisite training. In the end, the commander decides whether to perform the CATS recommended prerequisites, reduce or increase the CATS recommended frequencies, or choose a different prerequisite event based on the commander’s experience. The Combined Report in CATS uses the term “training gates” to describe the recommended prerequisite events as well as the sequence (crawl-walk-run) for the events. On the following page is an extract from a combined report showing an FTX event for an Armor Company.
The CATS provides: a recommended training audience, purpose, outcome and execution guidance for training events as well as the condition set for the event. For this example event, the recommended prerequisites are:

- STX for Conduct Security Operations (Live)
- STX for Conduct an Attack (Live)
- STX for Conduct a Defense (Live)
- STX for Conduct Stability Operations - Company/Troop (Live)
- STX for Conduct Breaching Operations (Live)

Although these STX-type events may have been planned when developing the UTP, sometimes the “gates” recommended by CATS are classes and TEWTs and other events that are usually relegated or directed for subordinate units to plan and execute. CATS event information provides a good reminder to the commander to ensure his units and Soldiers are prepared for the training event.

Sergeant’s Time Training (STT)

As a subset of prerequisite training, commanders, sergeants major, first sergeants and leaders at every level should always protect, support, incorporate and maximize the importance of STT. This can be some of the most beneficial and effective training that a unit
conducts every week. If individual Soldiers and leaders cannot perform their basic tasks, the unit will never successfully accomplish or gain proficiency in its KCTs.

4-23. Many installations reserve 3-4 hours each week in the morning or afternoon of Wednesday or Thursday. The day of the week is not important, but STT should be given a dedicated time on the training schedule, and must be planned, resourced, rehearsed, and executed with no external distracters.

4-24. STT is standards-based, performance-oriented, individual and warrior task-focused training. Commanders emphasize individual soldier training in support of KCTs by allocating dedicated training time for NCO’s using STT. STT recognizes the NCO’s primary role in conducting individual, crew, and small team training.

4-25. STT develops junior leaders and builds cohesive teams. Based on their training assessment and platoon leader guidance, NCOs select specific individual, warrior, crew, and small team tasks that support the unit’s KCTs. Once these tasks are approved, they plan, prepare, rehearse, execute and assess the training. Training to standard, not to time, is the bottom line; if additional time is needed or tasks must be retrained, the first line leaders must communicate these needs throughout the chain of command. Given the limited time available, the tasks to be trained are those needing the most work to attain proficiency.

4-26. Commanders approve the selected tasks, provide the necessary resources, allocate time to prepare, and monitor the training. CSMs and 1SGs supervise the training, and they coach, teach, and mentor junior NCOs.

4-27. Units at battalion and above will use the MDMP and companies and below will use TLP to plan their respective training events. The planning process for training is the same as planning for operations, so units should be well versed in these procedures.

Also refer to the Unit Training Management (UTM) page on ATN for additional supporting resources.
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4-28. As the unit works through training event planning, key pieces of information are required. An approved UTP contains initial training objectives for each training event, additional guidance, and KCTs proficiency aim points or required-by-dates. Training objectives should be reviewed and refined as necessary, as well as the identification of additional tasks to train during the event. Commanders and staffs refine these as they execute the UTP and plan, prepare, execute and assess each training event. Because every plan must be fluid and account for adjustments, the training objectives for each event should be adjusted during planning to reflect proficiency mastered or required retraining after each event. Below is an example of training objectives for a training event.

17 – 21 February 2015
FTX Armor Company, Training Objectives

**Task Focus (KCT)s:**
- Conduct an Attack (07-2-9001)
- Conduct Area Security (07-2-1324)
- Breach an Obstacle (17-2-3070)

**Conditions:** In a live environment under continuous operations, in both day and night, and in various MOPP levels.

**Standard:** The company conducts operations IAW SOP, the order, and higher guidance. Achieve satisfactory performance (80% T&EO go) on KCTs.

**Evaluation:** Company Internal (Commander or designate representative).

*Individual:* Demonstrated ability to perform Warrior Tasks and Battle Drills as part of a team.  
*Collective:* Achieve 80% ‘go’ on the KCT Training and Evaluation Outline (T&EO) performance standards.  
*Leader:* Demonstrated ability to make sound tactical decisions enabling unit battlefield success.

Figure 4-5. Example training objectives, armor company FTX

4-29. Since the UTP was developed to encompass the entire planning horizon, time will have passed since the UTP was approved and the training event planned. Using the UTP as a base, mission analysis during event planning, at a minimum, should consist of refinement of the audience (attendance), tasks, end-state (objectives) and environment, as necessary. The UTP also contains the initial KCTs required to be trained for the event listed in the objectives.

4-30. In order to ensure the tasks are performed to the Army standard during the training event, commanders use Training and Evaluation Outlines (T&EO) for all collective (and individual) tasks. When no standard exists, the commander determines the conditions and standards and the next higher commander approves it. This is especially true for many TDA units, where units may not have proponent-published T&EOs for their tasks. T&EOs can be found in CATS, DTMS, and ATN. Each KCT will have an associated T&EO. The T&EO will provide the task, conditions and standards, the performance steps, the performance
measures, the supporting individual tasks, supporting drills and supporting collective tasks. Below is a T&EO extract showing these portions of the T&EO using the CATS Viewer on ATN.

Figure 4-6. T&EO extract from the CATS viewer on ATN

4-31. Planners should at a minimum, publish T&EOs numbers and titles either in the OPORD or as separate packets to all necessary personnel. These can be accessed directly via the ATN “Task Search” on the ATN homepage. Users can also access T&EO’s via the CATS Viewer on ATN and also via DTMS, if the user has these privileges. This ensures that commanders, planners, OCTs, and leaders at every level can reference the standards to train and evaluate the selected tasks to standard as the tasks are being trained.

4-32. The UTP will have an initial end-state for the event expressed as a training objective (TO). Based on the commander’s assessment of training during training meetings leading up to the event, the TO may also need to be refined or restated. This ensures that the unit continues to progress at the training levels required to attain KCT proficiency on time. The event end-state should clearly define the performance proficiency level required at the end of the event. The end-state should also focus on KCTs, but leader and individual objectives must also be included in the end-state.

4-33. CATS provide the recommended training audience for each type of event. Commanders should maximize the integration of combat multipliers while conducting multiechelon training whenever possible to optimize the time available, and ensure the unit trains as it will fight. Modifications to the training audience may also be necessary to optimize the number of individual Soldiers trained during each event. A detailed observation and
assessment plan ensures realistic, obtainable and measurable training objectives are attained. Commanders and planners use CATS as a tool, but more importantly use their personal experiences to create the best training event possible.

**Provide Planning Guidance**

4-34. Commanders provide pre-execution guidance to subordinate units early in the planning process. This ensures they meet the commander’s intent throughout the planning process. This guidance helps keep subordinate leaders and planners in synch with the commander’s vision for the event. Below is an example of pre-execution guidance.

**17 – 21 February 2015**

**FTX Armor Company, Planning Guidance**

- Review After-Action Reviews (AAR) from previous events.
- Review Training Objectives (TO) for the event.
- Review applicable Training and Evaluation Outlines (T&EO) for Key Collective Tasks (KCT).
- Review major resource requests from the Unit Training Plan (UTP).
- Train during normal duty hours unless requested otherwise.
- Identify and assess prerequisite training.
- Updates during unit training meetings.

Figure 4-7. Example planning guidance for an armor company FTX

**Identify Trainer, Evaluator, OCT and OPFOR Duties**

4-35. Based on the training objectives, commanders determine the duties for trainers, evaluators, observer-controller/trainers and opposing forces. Each part of the event “package” should be clearly defined, to include the requirements and purpose. The identification and qualifications for supporting individuals (internal or external resource requirements) is also critical to the success of an event. Units can often get standard packets from their SOPs, and adjust those to meet the unique event requirements or draw them from a similar event previously conducted.

**Additional Supporting Resources (also see the UTM page on ATN)**

- **Video** [How to Plan & Conduct a Unit Training Event](#)
- **Tutorial** [TLP for Planning a Training Event](#)
- **ATN page** [OPFOR Doctrine](#)
- **ATN Page** [TRADOC Common Framework of Scenarios](#)
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T-10

Publish WARNO and Begin Pre-Execution Checks

4-36. As previously stated in Training Week (T-11), individual Soldier training objectives in terms of the tasks to be trained must be developed for every training event. These training objectives should include individual-focused tasks and battle drills. These are usually directed to be trained during the event, or included with all prerequisite training to be accomplished NLT T-4. Individual supporting tasks and battle drills are found in CATS listed under each of the collective tasks. The training gates are located in the CATS Combined Report, and listed under the type of event (ie, FTX). Below is an example of individual training objectives provided to a company, by a platoon.

17 – 21 February 2015

FTX Armor Company, Individual Training Objectives (1st Platoon)

Individual Tasks:
Individual training task focus (weeks T-9 to T-7) in preparation for the Company FTX:
- Move Under Direct Fire (071-COM-0502)
- Direct Main Gun Engagements on M1-Series Tank (171-126-1322)
- Direct Machine Gun Engagements on M1-Series Tank (171-126-1262)
- Communicate in a Radio Net (113-571-1003)
- Engage Targets with M16 / M4 Series Carbine (071-COM-0030)

Battle Drills:
Battle Drill focus training (weeks T-6 to T-4) in preparation for the Company FTX:
- React to an IED Attack While Mounted (05-3-D0017)
- React to Direct Fire Contact (07-3-D9501)
- React to Indirect Fire (07-3-D9504)
- React to CBRN Attack (17-3-D8006)
- Breach of a Mined Wired Obstacle (07-3-D9412)

Training Gates:
Individual tasks & battle drills are nested with training gates (from CATS) for an Armor Company FTX:
- STX Attack
- STX Defend
- STX Breaching Operations
- STX Security Operations
- STX Stability Operations

Figure 4-8. Example, individual training objectives for an armor platoon, company FTX

Define the Environment

4-37. Both the Operational Environment (OE) and training environment must be analyzed in order to correctly replicate the OE in training. This provides a higher degree of fidelity to training scenarios, and ultimately makes the training more challenging and realistic.

Training Operational Environment (OE)

4-38. The first part of defining the training environment is to determine the OE to be replicated. The training OE is a composite of the conditions, circumstances, and influences that affect the employment of capabilities and bear on the decisions of the commander. The OE consists of the political, military, economic, social, information, infrastructure, physical environment, time (PMESII-PT) operational variables, as well as the mission variables of Mission, Enemy, Terrain, Time, and Civilians (METT-C).
4-39. Commanders conduct an initial counter-task analysis. This is an analysis of what is required to train the tasks selected for the event, such as OPFOR actions required to stimulate the collective tasks. These tasks should be tied directly to the training OE identified in the higher unit training WARNO. Additional resources are available through the TRADOC Intelligence Support Activity (TRISA) – Contemporary Operational Environment and Threat Integration Directorate (CTID) site.

Training Support

4-40. Once the tasks and the OE are determined for an event, the training support enablers must be selected. Training support consists of Training Aids, Devices, Simulators, and Simulations (TADSS); facilities (e.g., Mission Training Complexes, ranges), and Services (personnel running the ranges). There are three types of training support enablers – live, virtual and constructive that can be used for a collective training event. Consider employing each independently (the easiest to plan and prepare) or a combination of two or more environments may be used to meet the objective. If using more than one training environment, then leaders use either a Blended Training Environment (BTE) or an Integrated Training Environment (ITE), depending on where the installation is in the ITE fielding schedule.

4-41. A BTE event is accomplished using mission command systems to facilitate training using more than one type of enabler. However, the enablers are not integrated and synchronized. They require high overhead in terms of personnel to make the simulations and mission command systems (MCS) communicate with each other. The terrain databases in the MCS and TADSS are not correlated, which means that, without some workarounds, a kill in a constructive simulation may be seen as a miss in the virtual simulator. Blended training can provide the complex training environment necessary to develop agile, adaptive leaders and versatile units but it takes more resources than the ITE needs.

4-42. An ITE event uses consistent (common TADSS enablers across installations) and persistent (24x7 availability) live, virtual, and constructive enablers to stimulate mission command systems (MCS) using correlated terrain databases in MCS and the TADSS and the Live, Virtual, Constructive – Integrating Architecture (LVC-IA). LVC-IA is the architecture (standards, protocols, hardware and software) which enables seamless, synchronized integration among MCS and the simulations/simulators.

4-43. All training requires some form of training support—TADSS, facilities, services, ranges, maneuver space, etc. Planning and preparing BTE and ITE are more complex than conducting simple maneuver or movement training. However, BTE and ITE events enable units to increase training value with fewer resources. They also enable tailoring the conditions in various levels of complexity to make the training more challenging, as well as enabling a quick turn-around in re-training with relatively low cost.

4-44. CATS events will often provide a variety of live, virtual or constructive options from which to choose to train task selections and collective tasks. For example, there will often be a “walk” level event such as an STX virtual event and a similar STX live event for “walk/run” level training.

4-45. Just as a leader must understand the operational environment in combat, a leader early on must understand the training environment at home station or wherever the unit is training. That means the leader must early in his/her tenure, talk to the right people (e.g., DPTMS, Range Control, MTC staff) and visit the right facilities (e.g., ranges, maneuver/movement space) and then take the unit’s leaders on a terrain walk of those capabilities.
4-46. The diagram below depicts the different training enablers and how they may be mixed at different echelons in relation to the event level of training. For more information on the ITE, access the Training and Home Station by Leveraging Training Support Handbook on ATN.

**Live, Virtual, and Constructive Training Mix**

<table>
<thead>
<tr>
<th>Several Options: Commanders Determine the Mix</th>
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<tbody>
<tr>
<td>Leaders</td>
</tr>
<tr>
<td>Crawl</td>
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<tr>
<td>Brigade</td>
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<tr>
<td>Battalion</td>
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<tr>
<td>Company</td>
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<tr>
<td>Platoon</td>
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<tr>
<td>Crew/Squad</td>
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<tr>
<td>Individual</td>
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Live (L) – Training executed in field conditions using tactical equipment enhanced by training aids, devices, simulators, and simulations (TADSS) and tactical engagement simulation to simulate combat conditions.

Virtual (V) – Training executed using computer-generated battlefields in simulators with approximate characteristics of tactical weapons systems and vehicles. Virtual tactical engagement simulation training permits units to maneuver over much larger areas.

Constructive (C) – Training that uses computer models and simulations to exercise the command and staff functions of units from platoon through echelons above corps.

Figure 4-9. Example LVC training mix from brigade to individual Soldier

**Develop a Base Tactical Scenario**

4-47. After determining the OPFOR requirements, a determination of the initial requirements for scripting, role playing and Master Scenario Events List (MSEL) must be completed. All the information gathered and developed during weeks T-11 and T-10 inform the commander of the personnel, logistics and other resource requirements to support the performance of the training event. Once compiled, the commander can issue a WARNO tasking subordinates and requiring coordination to support the event.
Publish WARNO

4-48. A warning order should be produced and distributed at the end of mission analysis to facilitate parallel planning at the subordinate unit level. At a minimum, this should contain the training audience, training objectives, location, date, resource and personnel support requirements and training environment guidance.

Pre-Execution Checks

4-49. Pre-execution checks are the informal coordination conducted prior to conducting training events – these are not pre-combat checks. They are developed by the chain of command to prepare Soldiers, leaders, trainers, and units systematically, and to ensure that training is resourced and conducted properly. They become increasingly detailed as training schedules are developed. Pre-execution checks provide the attention to detail needed to use resources efficiently. These checks are developed and responsibilities for them are fixed. Pre-execution checks are an important component of preparation for training events. Below is an example of a pre-execution checklist:

- What is the current level of collective/individual task proficiency?
- What are the lessons learned from the last time training was conducted?
- Has the OPFOR been equipped and trained (if applicable)?
- Are combat multipliers integrated into planning and execution of training?
- Has a risk assessment been completed? Have safety considerations been completed?
- Are Soldiers trained on prerequisite tasks?
- Have the appropriate training support been requested?
- Has reconnaissance of the training site been conducted?
- Are ranges and maneuver books on hand?
- Are leaders certified to conduct range operations?
- Are leaders briefed on environmental considerations?
- Have convoy clearances been submitted and approved?
- Have TADSS been identified and approved?
- Can trainers properly operate all TADSS?
- Has Class I been requested?
- Has Class III been requested and picked-up?
- Has Class V been requested per ASP requirements and picked-up?
• Has transportation been requested?
• Are sufficient expendable supplies on hand?
• Is a rehearsal time programmed for trainers?
• Has a back-brief for the chain of command been coordinated?
• Is time scheduled for AARs at the end and throughout the exercise?

Figure 4-10. Example pre-execution checklist

Additional Supporting Resources (also see the UTM page on ATN)

Example  Pre-Execution Checklist
ATN page  TRADOC Common Framework of Scenarios (CFoS)
ATN page  Integrated Training Environment (ITE)
**T-9**

**Conduct Resource Planning and Submit Initial Resource Requests**

4-50. Major resource requirements are stated in the UTP and major facilities are earmarked between T-21 to T-13. Now the unit must conduct the detailed planning for every class of supply to support both the administrative and tactical execution of the training event. General resource requirements and information can be found in the CATS; the commander will modify these general requirements based on the desired end-state of training and/or the local training environment.

4-51. Security classification of the event and associated measures can impact the administrative resource requirements (more guards, protocols and destruction capabilities are required for classified events).

4-52. There are three main sources to draw resource estimates from: CATS, installation planning and forecasting tools/guidance, and tactical logistics planning tools.

**CATS**

4-53. CATS provide proponent-recommended resources necessary to conduct training. It can provide units with a good start point to begin determining their requirements. Historic documentation from previous training events and experience from the commander and staff should be used to refine/improve any data provided by CATS and best forecast unit needs. The more resourced-constrained the training environment, the more likely leaders will use virtual, constructive, and gaming capabilities to support training.

4-54. Below is an extract from CATS showing the recommended resources for a training event.

![CATS Extract from Combined Report](image)

Figure 4-11. CATS extract from a CATS combined report
After determining OPFOR requirements and the tactical scenario, commanders can make a more informed estimate of the Training Aids Devices Simulations and Simulators (TADSS) required to support the training event. General TADSS recommendations for each training event can be located in the CATS for the unit; the commander will modify the recommended TADSS based on the desired end-state of training and/or local training environment. Commanders and planners can also use the TADSS page on ATN to refine their requirements or research availability. The page provides TADSS descriptions, contacts for every installation and a list of resources and supporting materials that are very helpful. Training managers should always check-in with their local installation-level TADSS office first to determine what resources are locally available and coordinate off-installation support when needed.

**Installation planning and forecasting tools/guidance:**

4-56. Most installations publish their 350-1 Training Regulations which provide local training support request procedures, tools and timelines. Some provide links to common forecasting and requesting tools and unique training resources, such as:

- Training ammunition management information system (TAMIS)
- Range Facility Management Support System (RFMSS)
- Integrated Training Area Management (ITAM)
- Mission Training Complexes (MTCs; formerly Battle Simulation Centers, and Battle or Mission Command Training Centers)
- Training Support Centers (TSC)
- Medical Evacuation (MEDEVAC) procedures and frequencies

G4s also publish procedures for all other classes of supply and services, food service, maintenance and transportation support and non-standard support items such as chemical latrines.

**Tactical Logistics Planning Tools**

4-57. Finally, various planning tools such as the Operational Logistics (OPLOG) planner are available for planning every class of supply. The OPLOG planner is the official U.S. Army tool for planning tactical logistics requirements, but others are readily available either institutional or independently produced. OPLOG Planner Version 8.0 is available through Army Knowledge Online (AKO) at: https://www.us.army.mil/suite/doc/38799333

**Request Support**

4-58. Almost every resource and class of supply may have different systems, websites, procedures and timelines for forecasting and requesting; therefore, requests should be processed as soon as possible and IAW the required timelines set by higher.
Additional Supporting Resources (also see the UTM page on ATN)

Tutorial
Training Resource Considerations

Tutorial
Training Resources in CATS

ATN page
Training Aids Devices Simulators and Simulations (TADSS)
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Execute Reconnaissance and Lock-in Resources

4-59. After determining the training environment and required training support resources, an initial reconnaissance of the training site(s) and facilities must be conducted. The purpose of this reconnaissance is to ensure that the training environment provides the necessary conditions to allow the training of the collective tasks to the level of fidelity needed. This will facilitate identification of details to complete the plan, specifically the simulations architecture possibilities and limitations. This reconnaissance helps identify any previously overlooked resources and other issues – to include security issues, traffic control and possible route concerns. Minimum personnel required on a recon are: leaders, evaluators, trainers, Observer-Controllers/Trainers (OCTs), and OPFOR. Below is a sample of common questions that should be answered during the initial recon:

Training Area Reconnaissance Questions

Admin:
- Are reconnaissance personnel familiar with the OPORD and commander’s guidance?
- Are there safety-related environmental factors (flash flood area, electric hazards, wildlife)?
- How does the terrain support administrative employment of equipment and personnel?
- Where will sleep areas be located?
- Where is the maintenance area?
- What is the distance from garrison?
- How much fuel is required?
- Is heavy equipment transport an option?
- Are maps available?
- Is satellite imagery updated?
- Where is or should the resupply point located? Is it acceptable?
- Can roads and bridges support heavy vehicle crossing? Confirm.
- Is the road network in the AO sufficient to support the operation?
- Does the traffic flow inside the AO need to be marked?
- Is there an area sufficient for aerial MEDEVAC?
- Are civilians in the area or cleared from the area?
- What logistic support is available on site (water, electric, sewer, etc)?
- What type of hard stand support is available? Will it support the commander’s objective?
- Where is the access control point located?

**Tactical:**
- Can the terrain support the commander’s objectives?
- Is the area large enough to support the required unit-level maneuver?
- How does the terrain support tactical employment of equipment and personnel?
- Where is the fuel point located?
- Where is the ammunition distribution point located? What is the blast area?
- Is the network available (FM, cell phone, satellite, etc)?
- Where is the command post and alternate command post located?
- How much class IV is required?
- Where is the prisoner exchange point?
- Where are enemy avenues of approach?
- Where are fields of fire?
- What is the safety danger zone?
- Where are the observations post located?
- Where are alternate and secondary positions?
- Does terrain facilitate traffic management?

**Lock-in Resources**

4-60. Following initial reconnaissance, re-confirm that all resources are locked-in (request receipts verified) to ensure all equipment, facilities and supplies are available for training. Training resources are often managed via annual, quarterly and weekly conferences and/or meetings (training meetings, etc). Always check for the local installation requirements. Common examples are but not limited to:
- Monthly Training Resource Integration Conference (TRIC)
- Weekly Range and Training Area Scheduling Conference
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T-7
Publish OPORD for Training Event

4-61. After the plan has been approved by the commander, the OPORD is published in the standard five paragraph OPORD format with required modifications to the annexes to reflect training-specific requirements. Generally, this is completed at T-7. The OPORD can be posted on DTMS (preferred) or sent in another form (email, hard copy or shared drive).

4-62. The base OPORD for the training event is administrative, coordinating the actions necessary to manage the execution of the event. This does not include the tactical plan and Master Scenario Events List (MSEL). A major component of the OPORD is the identification of the collective and individual tasks to be trained and the desired levels of task proficiency expected to be reached by the conclusion of training. The OPORD should also address the actions to be taken to retrain the collective/individual tasks during the event if the desired end-state is not achieved. Below is an example format for an administrative OPORD. The annexes may be published later as a follow up.

Training Event OPORD
Format (administrative)

1. Situation

2. Mission

3. Execution
   a. Commander’s Intent
   b. Concept of the Operation
   c. Tasks to Subordinate Units
   d. Coordinating Instructions

4. Sustainment (Logistics Support Plan)

5. Command and Signal
   Annex A. Task Organization
   Annex B. Intelligence (Training Environment)
   Annex C. Operations
      a. Leader Development Plan
      b. Evaluation Plan
      c. Observer/Controller (OC) Plan

Figure 4-12. Training event OPORD format

4-63. As part of the administrative order, both the BLUFOR (training audience) and the OPFOR troop list must be published. The troop list is normally annex A to the OPORD.

4-64. Trainers, evaluators and observer-controller/trainers must be identified. At seven weeks out, specific names may not yet be available; however, at a minimum, identifying the grade and background necessary to fill the position will help in tasking a subordinate unit or
coordinating for support through higher headquarters. If the names are known – this information goes in annex A.

4-65. The leader development plan is part of the order. This plan should address pre-requisite training leading up to the event as well as the event itself and the follow-on post event reviews. Training for leaders must be increasingly difficult and complex to train adaptable and agile leaders. Below is an example leader development plan for a company-level training event. This should be part of annex C (operations) to the order.

17 – 21 February 2015
FTX Armor Company, Leader Development Plan

**Task Focus (KCT)s:**
- Conduct an Attack (07-2-9001)
- Conduct a Defense (07-2-9003)
- Conduct Area Security (07-2-1324)
- Breach an Obstacle (17-2-3070)

**Leader Objective:** Demonstrated ability to make sound tactical decisions enabling unit battlefield success.

**Leader Training:**
**Crawl:**
- Conduct OPD/NCOPD – Attack (T-8); Deliberate Breach (T-7); Defend (T-6); Area Security (T-5)
- Review unit SOPs, Collective Task T&EO (supporting KCTs), and TTPs (check on learning during rehearsal)
- Develop Individual Training Objectives at all echelons (T-10)
- Conduct leader certification training as necessary (training area, MILES, etc.)

**Walk:**
- Squad Rehearsal (T-3); Platoon Rehearsal (T-2); Company Rehearsal (T-1)
- Conduct Pre-Execution Checks (T-10 – T-1)
- Conduct Pre-Combat Checks (T-Week)

**Run:**
- Conduct informal AARs at all echelons (T-Week)
- Conduct leader performance feedback at all echelons using performance steps from KCTs (T-Week)
- All leaders facilitate a positive learning environment (T-Week)

Figure 4-13. Example LD plan for an armor company

4-66. The logistics plan to support the event is the last critical piece of the administrative order. This plan should address the resources requested at T-9. The logistics plan also lays out the coordination requirements for attached support, e.g., medical, maintenance, chemical, engineer and military police support. The next page depicts an example of a logistics support plan for a company-level training event.
17 – 21 February 2015
FTX Armor Company, Logistics Support Plan

**Logistics Support Objective:** Provide continuous logistic support to the company, OPFOR and attachments during the FTX.

**Class I:** Ration cycle M-M-A. Battalion LOGPAC operations 1500 daily at designated LRP. Est. headcount – 96; OPFOR – 32. 2 DOS O/H basic load.

**Class III:** LOGPAC daily; est. fuel consumption – 430 gal per day; OPFOR – 300 gal per day. FRH and Oil as required.

**Class IV:** 4 A Packs and 4 B Packs located at the designated CL IV point; issue on order.

**Class V:** L602 (Hoffman) – 504; OPFOR 288
A111 (7.62 blank) – 5,800; OPFOR 2,856
A598 (.50 Cal blank) – 4,200; OPFOR 2,300
A080 (5.56mm blank) – 4,080; OPFOR 2,040
L367 (ATWESS) – OPFOR 25
LG988 (Grnd CS) – 14

**Class VIII:** Combat lifesaver bags fully supplied (1 per vehicle); Medical attachment with basic load.

**Class IX:** PLL items available on request through LOGPAC.

**Medical:** Medical team attached to the company; combat lifesavers trained – one per vehicle (operations per SOP).

**Maintenance:** Company maintenance and recovery team attached (operations per SOP).

LOGPAC from AHA to ASP on T-Day 1. Distribution on order.

**Figure 4-14.** Example log support plan for an armor company FTX

**Schedule TADSS Certification Training**

4-67. After **TADSS** requirements are identified and requested, commanders schedule the training necessary to ensure trainers and operators are trained and certified prior to the event.

**Additional Supporting Resources (also see the **UTM page** on ATN)**

**Video**
- How to Plan & Conduct a Unit Training Event

**PDF**
- Commander’s Guide to Leader Development

**Link**
- Training Aids, Devices, Simulators and Simulations (TADSS)
T-6

Lock-in Training and Publish Training Schedules

Training Schedules

4-68. Training schedules are focused and published at the company-level and are the primary means of communicating the scheduled training to Soldiers. Training schedules cite the collective/individual tasks to be trained. Training schedules are a written order issued by the unit commander. Training schedules are usually organized by or coincide with training weeks and cover a full week or more. The goal for publication is T-6 weeks out, but is at the discretion of the higher commander. Training schedules are approved by the next higher commander and signed by the unit commander. For example, a company training schedule is signed by the company commander and approved by the battalion commander.

![Diagram showing the approval process of company training schedules]

Figure 4-15. Approval of company training schedules

Lock-In and Protect Training

4-69. Failure to lock-in training and adhere to published training schedules can ruin the unit’s ability to execute effective training. It also creates an atmosphere in which leaders and Soldiers at all levels lose confidence in the unit’s leadership to ensure training is protected and supported by the chain of command. The message sent by such indiscipline is that training and leader development are not priorities.

Changes to Training Schedules

4-70. Changes to training are sometime unavoidable, but to the greatest extent, these should be kept to an absolute minimum. Higher commanders must protect subordinate units from needless, un-programmed taskings and other training distracters. One technique is to establish an approving authority for changes to company-level training schedules once published. For example, if a change occurs to a company training schedule, the change would be approved by the brigade commander. This helps keep changes to an absolute minimum and makes training more predictable for the Soldiers and the trainers.
4-71. For the Soldier, the training schedule specifies the tasks to be trained, where he needs to be, when he needs to be there, the uniform he must be in, and the equipment he must bring. It also tells him any additional information he needs to know, to include the references he can read in advance regarding the particular training task, event, or operation. It also tells him who is giving the instruction, or training.

**Publish Training Schedules in DTMS**

4-72. Training schedules and calendars are published in the Digital Training Management System (DTMS) upon approval in the unit training meeting and locked-in at T-6. They are approved and signed (digitally, when possible) by the commanders.
Submit Safety Risk Assessments

4-73. Safety risk assessments are completed and submitted to the higher commander for approval. More important than just the form is the mental process used by the commander to identify and mitigate safety risks. Often, identifying the right leader to be positioned at the most dangerous place or time for the unit is the best mitigating control measure. Below is an example of a safety risk assessment. Also refer to the Composite Risk Management (CRM) page at https://safety.army.mil/crm/.
Figure 4-18. Example safety risk assessment

Also refer to the Unit Training Management (UTM) page on ATN for additional supporting resources.
T-5
Complete Tactical Plan and Supporting Products

4-74. After the administrative order is published, the resources are locked-in, and the training schedule is set – the remaining pieces of the plan can be completed. This will include the tactical plan (BLUFOR and OPFOR), exercise control plan, evaluation plan, and leader certification plan.

Complete the Tactical Plan

4-75. It is important to complete the tactical order to ensure it drives the training to meet the training objectives. This includes both the BLUFOR tactical order and the OPFOR tactical order to ensure all training aids are synchronized and focused. This can become much more complex if multiple training support enablers are used. Assistance from local Mission Training Complex (MTC) will be required to ensure data are uploaded into the simulation.

Complete the Master Scenario Events List (MSEL)

4-76. Initial MSELS were developed at T-10 to ensure the desired training could be performed and the support required was coordinated for. MSELS are now completed to train a task that will not be driven by the OPFOR. Example: Task: “Conduct a leader engagement with a local mayor.” A MSEL scenario can be written with injects, role players and special location created to make training the collective and individual tasks as realistic and challenging as possible. Example MSELS for the Army’s approved training scenarios can be found at Mission Command Collective Training Scenarios Training Support Package (MCTSP), section 5 (available on ATN). The MCTSP can provide scenario development products to assist planners and commanders.

Observer-controller/trainer Plan

4-77. Developing an exercise control plan facilitates the synchronization and management of the training event. For a small unit training event, this can be a simple graphic with timelines and control measures. For a small unit lane training event, the following example could serve as the start for a simple control plan:
4-78. For larger scale events, the plan may include: “Road-to-War” scenario, white cell personnel and equipment, observer-controller/trainers and rules of engagement (ROE). In addition to the scenario, a higher HQ order should be developed to drive the training event.

4-79. The observer-controller/trainer plan should address who (by name) the OCTs are and the assessment plan. It should also outline how the OCTs (by name) are supported with supplies (and from whom) and a lay out OCT duties. It should also lay out what the OCT packet consists of (e.g., unit SOPs, T&EOs, doctrinal manuals, ROE), pyrotechnics (class V) on hand, OCT MILES control guns, etc. OCTs must be familiar with both the BLUEFOR and OPFOR plans and attend key unit events (back-briefs, rehearsals, PCCs, etc).

4-80. As a controller, OCTs must ensure all systems are working properly prior to the event to ensure no “cheating” will skew outcomes. OCTs must understand the training support systems being used for the event. OCTs may also need to conduct “work-arounds” if live or simulated conditions cannot portray the realism necessary to achieve the training objectives. As with any leader, OCTs help ensure the event is conducted safely. Unsafe acts must be addressed immediately. Below is an example OCT plan.
17 – 21 February 2015
FTX Armor Company, Observer/Controller Plan

Observer/Controllers:
CPT Green (Company OC)
SFC Smith (1st Platoon OC)
SFC Jones (2nd Platoon OC)
SFC Martin (3rd Platoon OC)

Develop O/C Packet: OCs will develop an OC packet NLT T-5 to include, ROE, event OPORD, applicable doctrine, TTPs, and T&EOs.

Supporting Products (References) http://www.apd.army.mil
FM 3-21.10 THE INFANTRY RIFLE COMPANY DRAFT
FM 3-90.1 Tank and Mechanized Infantry Company Team (formerly FM 71-1)
FM 3-21.8 The Infantry Platoon and Squad.
FM 3-34 ENGINEER OPERATIONS
FM 3-34.2 (FM 90-13-1) COMBINED ARMS BREACHING OPERATIONS
ATTP 3-21.71 MECHANIZED INFANTRY PLATOON AND SQUAD (BRADLEY)

Certification: OCs will provide a confirmation brief to the commander that they understand the scenario, BLUEFOR and OPFOR tactical plans, OE, and training objectives prior to the rehearsals.

AAR Plan: OCs will develop an AAR plan to include formal and informal AARs and brief the commander on the plan NLT T-1.

Equipment / Class V: OCs will draw green keys and control guns at T-1. Each OC will have a CLS bag on their vehicle. Each OC will draw 1 red smoke and 1 x red star cluster.

Radio: Establish O/C NET (Freq 28.5).

Figure 4-20. Example observer/controller plan, company FTX

Evaluation Plan

4-81. The evaluators may be unit-internal or external. Evaluators must have a copy of the collective and individual task T&EOs and be familiar with the scenario to ensure proper evaluation. Evaluators can be separate from the OCTs, allowing OCTs to be strictly trainers and facilitate AARs. OCTs can also be evaluators, depending on the commander’s intent and type of exercise.

4-82. Evaluation packets must be given to the commander upon completion for his assessment. Below is an example evaluation plan.
17 – 21 February 2015
FTX Armor Company, Evaluation Plan

**Evaluators:** For this event, the Assistant S3 and the Assistant S4 (Captain White) will conduct the evaluation for the KCTs using the Training and Evaluation Outlines (T&EO)s.

**Task Focus (KCT)s:**
- Conduct an Attack (07-2-9001)
- Conduct a Defense (07-2-9003)
- Conduct Area Security (07-2-1324)
- Breach an Obstacle (17-2-3070)

**Supporting Products (References) [http://www.apd.army.mil]**
- FM 3-21.10 THE INFANTRY RIFLE COMPANY DRAFT
- FM 3-90.1 Tank and Mechanized Infantry Company Team (formerly FM 71-1)
- FM 3-21.8 The Infantry Platoon and Squad.
- FM 3-34 ENGINEER OPERATIONS
- FM 3-34.2 (FM 90-13-1) COMBINED ARMS BREACHING OPERATIONS
- ATTP 3-21.71 MECHANIZED INFANTRY PLATOON AND SQUAD (BRADLEY)

**Assessment:** Completed T&EOs for each task along with notes for performance steps will be provided to the Company Commander for assessment NLT 22 February 2015.

**Coordinating Instructions:** Self sufficient transportation for the exercise; company will provide Class I and III. Must have references and T&EOs as well as personal map and binoculars to support the evaluation. Link up with the evaluated unit at LD, coordinate with OCs for assistance as necessary.

Figure 4-21. Example evaluation plan, company FTX

Also refer to the Unit Training Management (UTM) page on ATN for additional supporting resources.
T-4  
**Conduct Certifications and Complete Prerequisite Training**

4-83. Evaluators report to the commander. They must understand the collective tasks they are evaluating, the scenario and the training environment. Commanders ensure the evaluators are prepared. The plan must have all link-up times and list everything the evaluators need to bring with them (T&EOs, references, and support if necessary). Evaluators must also back-brief the commander prior to execution to ensure everyone is synchronized.

4-84. Observer-Controllers/Trainers must be trained on how to facilitate the appropriate type of AAR for the event (informal or formal). They must have full knowledge of the scenario, BLUEFOR and OPFOR plans, OE, and the training objectives. They must understand all safety and medical evacuation procedures. OCTs report to Exercise Control (EXCON). In the case of an internal event, it would be the commander. The commander certifies the OCTs through back-briefs on the training and training requirements.

4-85. The opposing force leaders back-brief the commander on their tactical plan. The commander may adjust the OPFOR plan based on the training objectives. OPFOR capabilities should be sufficient to ensure flexibility during the event. The OPFOR must be certified in the correct portrayal of the threat, and be prepared to execute threat Tactics, Techniques, and Procedures (TTPs). The commander or designated representative certifies the OPFOR. The OPFOR must have counter-tasks identified so that they will cause the unit to train and perform the collective and individual tasks to the Army standard (as stated in the T&EO).

**Train the Trainers**

4-86. Qualified and competent trainers are critical in delivering quality, effective training to the unit. Trainers must demonstrate task proficiency before teaching a task to others. Commanders and leaders ensure that trainers are prepared to conduct performance-oriented training to standard. They ensure adequate preparation time so the trainer:

- Understands the commander’s guidance
- Knows the tasks, conditions, and standards to be performed
- Has demonstrated the tasks to standard
- Reviews references, such as ADP 7-0, ADRP 7-0, The Leader’s Guide to Unit Training Management (UTM), ATN, T&EOs, CATS, Soldier’s manuals, FMs, and TMs as needed
- Gathers and prepares training support items as required
The Leader's Guide to Unit Training Management (UTM)

December 2013

- Conducts a reconnaissance of the training site prior to training
- Prepares the training and materials needed
- Conducts a risk assessment
- Schedules rehearsals for himself and other trainers
- Plans, prepares, and rehearses the conduct of AARs

Certification

4-87. Certification is a measure of individual/crew/team technical proficiency. Unit commanders are responsible for creating and managing unit certification programs. Certification is not a normal part of day-to-day training. The decision to require certification is made at a higher headquarters and is the result of a deliberate process. Certification requirements for observer-controller/trainers (OCT) and individuals to supervise live-fire ranges, external evaluations, etc., are examples of individual technical proficiencies that commanders may require to support training. Certification is more often applied to processes and procedures that support operations and training, like conduct of live fire ranges.

4-88. Commanders may require certification to confirm a unit’s collective training proficiency to perform a specific type of mission or task. Certification of an infantry squad that has been tasked to conduct a specific stability or support task is an example of unit collective certification. Higher headquarters on a “by exception” basis, normally directs this confirmation requirement. Note: Individual Soldier certifications are recorded in DTMS in the “Soldier Manager” tab.

Also refer to the Unit Training Management (UTM) page on ATN for additional supporting resources.
Conduct Rehearsals

4-89. Prior to conducting a rehearsal, it is necessary to conduct the final reconnaissance of the training site. The initial reconnaissance was completed at T-8 (five weeks previously). Since that time, changes may have occurred. This may cause the tactical plan to be altered slightly, such as changing the location of the assembly area, or the route to the training area. The new timings and/or graphics are published in a FRAGO.

Rehearsal: “A session in which a staff or unit practices expected actions to improve performance during execution.” (see ADRP 5-0)

4-90. Rehearsals are conducted before training events and early enough to conduct multiple rehearsals, if necessary. They provide an invaluable means of ensuring actions during training are synchronized and executed to standard. Rehearsals also provide a mechanism for leaders and Soldiers to visualize what is supposed to happen, and to correct deficiencies during subsequent rehearsals, if necessary. Rehearsals allow leaders to:

- Identify weak points in the plan
- Teach effective training techniques
- Coach the trainer until he/she feels comfortable
- Ensure safety and environmental considerations are met and updated
- Determine if leaders are tactically & technically proficient
- Determine how the trainer will evaluate the Soldier’s or unit’s performance
- Assess subordinate trainer competencies and provide feedback
- Give subordinates confidence in their ability to train/operate

4-91. The following checklist is a guide for conducting rehearsals. It is an extract from ATTP 5-0.1, Commander and Staff Officer Guide:

- Rehearsal Agenda
- Conduct roll call
- Participant orientation to terrain
- Location of local civilians
Enemy situation brief
Friendly situation brief
Description of expected adversary actions
Discussion of friendly unit actions
Review of notes made by the recorder

Additional Supporting Resources (also see the UTM page on ATN)

Video
How to Conduct Rehearsals
T-2
Finalize Administrative Support Requirements and Conduct OPFOR Rehearsal

4-92. Submit all administrative clearances and requests as necessary. This may include convoy clearances, wash rack requests, range requests [to include Surface Danger Zone (SDZ) schematics], etc.

TADSS Certification Training

4-93. Units conduct TADSS certification training for trainers as scheduled during T-7.

OPFOR Rehearsal

4-94. Conduct an opposing force rehearsal to ensure the OPFOR tactical plan facilitates the BLUEFOR achieving its training objectives. This should include the administrative movement and preparation for the event as well as the tactical plan. The rehearsal enables subordinates to synchronize their plans with each other and enables the leaders to address possible decision points. The evaluators and observer-controller/trainers should be present at the OPFOR rehearsal to ensure they have a full understanding of the execution of the event.

Additional Supporting Resources (also see the UTM page on ATN)

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<thead>
<tr>
<th>Link</th>
<th>Training Aids, Devices, Simulators and Simulations (TADSS)</th>
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<td>Link</td>
<td>OPFOR Doctrine</td>
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<td>Example</td>
<td>Rehearsal Checklist</td>
</tr>
<tr>
<td>Video</td>
<td>How to Conduct Rehearsals</td>
</tr>
</tbody>
</table>
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T-1
Draw Equipment and Supplies and Execute Subordinate Rehearsals and Checks

4-95. At T-1, if not previously done, draw all required equipment and test it to ensure it is operational, thereby providing time to work through problems before the event starts. Training Support Centers (TSC) have unserviceable item exchange procedures that allow for swapping unserviceable TADSS if they are available in sufficient numbers. Units should plan sufficient time to exchange TADSS items, as necessary.

Training Site Preparation

4-96. All final site preparation must be conducted during T-1. If using a Mission Training Complex to support training, complete all preparations of the TADSS to be used.

Unit Rehearsal

4-97. Conduct a unit rehearsal to ensure the tactical plan is synchronized and enables the leaders to make decisions at the right time. The evaluators and observer-controller/trainers should be present at the BLUEFOR rehearsal to ensure they have a full understanding of the execution of the event. The rehearsal can facilitate adjustments to the MSEL.

Communications/Simulation Connectivity Test

4-98. Conduct testing a week out from the event, in order to test mission command system and TADSS connectivity. The evaluator and OCT communications check is also conducted during this week.

Additional Supporting Resources (also see the UTM page on ATN)

Example  Rehearsal Checklist

Video  How to Conduct Rehearsals

Link  Training Aids, Devices, Simulators and Simulations (TADSS)
T-Week
Execute Training

Pre-Combat Checks (PCC)

4-99. T-Week begins with pre-combat checks. Pre-combat checks are detailed final checks that units conduct immediately before and during the execution of training and operations. These checks are usually included in unit SOPs. They are normally conducted as part of troop leading procedures and can be as simple or as complex as the training or operation dictates. Pre-combat checks start in garrison and many are completed in the assembly area or in the training location; for example, applying camouflage, setting radio frequencies and distributing ammunition. Commanders must allocate sufficient time for subordinate leaders to execute pre-combat checks and inspections to standard. Below is an example of pre-combat checks:

- OPORD briefed/leaders and Soldiers know what is expected of them
- Safety checks and briefings completed
- All required TADSS are on hand and operational; for example, MILES equipment zeroed
- Before-operations PMCS completed on vehicles, weapons, communications, and CBRNE equipment
- Leaders and equipment inspected; for example, compasses, maps, strip maps, and binoculars
- Soldiers and equipment inspected and camouflaged; for example, weapons, ID cards, driver's licenses
- Soldier packing lists checked and enforced
- Medical support present and prepared
- Communications checks completed
- Ammunition (Class V) drawn, accounted for, prepared, and issued
- Vehicle load plans checked and confirmed; cargo secured
- Rations (Class I) drawn and issued
- Quartering party briefed and dispatched
- OPFOR personnel deployed and ready to execute their OPORD

**Draw Supplies**

4-100. Supplies should be drawn and inventoried at the beginning of the training week. Classes of supply should be distributed within the plan to ensure the event is properly resourced. Any shortage of requested supplies should be reported immediately.

**Conduct Training**

4-101. Training is conducted to allow the collective and individual tasks to be performed and to exercise unit SOPs and doctrine. And to allow TTPs to be identified, developed, or implemented.

**Informal After-Action Reviews (AAR)**

4-102. Informal AARs are conducted at all levels (from crew to battalion). They can be done for a unit or an individual. They may be scheduled or as needed during the training. Observations, insights, and lessons can be recorded for future use to identify trends and prevent reoccurrences of bad practices.

**Hip-Pocket (Opportunity) Training**

4-103. Hip-pocket training usually consists of individual tasks, selected by the commander that can be trained when the unit experiences inactive periods during scheduled training. It is also called “opportunity training” and is another technique for managing sustainment training. Tasks for this type of training are normally selected by the company commander so that when time becomes available, it can be used productively. Commanders can use training meetings to obtain input from subordinates on what collective/individual task training needs to be sustained. Hip-pocket training provides leaders confidence in their ability to train, which results in a more efficient use of Soldiers time. While the tasks selected for this type of training are usually individual tasks requiring sustainment training, leaders can inject new training, if time, training levels, and circumstances allow. Leaders should be able to train selected tasks within 15 to 30 minutes. Initial individual training or collective task training ordinarily requires more time and resources than will be available, but again, leaders should use their initiative to ensure their individuals are well trained and not time is wasted.

**Retrain/Retry**

4-104. Allocate sufficient time to retrain/re-try tasks during, or after training events. Not all tasks will be performed to standard on the first, or even second attempt. Therefore, leaders allocate and schedule time and other resources for unit retraining of key collective and individual tasks in their training plans. Retraining allows participants to implement corrective
action. Retraining should be completed at the earliest opportunity, if not immediately after the task(s) is attempted.ac. In some cases, a “restart” or “retry” of an event may be necessary before moving to the next training event.

4-105. To retry a task is to attempt the task until the Army standard is met. This can be either a collective task or an individual task. Training is incomplete until the organization or individual attains the Army standard as specified in the task’s training and evaluation outline (T&EO). Commanders do not allow an organization to end training believing that a substandard performance was acceptable.

**Additional Supporting Resources (also see the UTM page on ATN)**

<table>
<thead>
<tr>
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<tr>
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<td>Leader’s Guide to AARs</td>
</tr>
<tr>
<td>Video</td>
<td>How to Conduct an AAR</td>
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<tr>
<td>Video</td>
<td>How to Plan &amp; Conduct a Unit Training Event</td>
</tr>
<tr>
<td>Example</td>
<td>Pre-Combat Checks</td>
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<tr>
<td>Tutorial</td>
<td>Finding Tasks and Using T&amp;EOs</td>
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</tbody>
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T+1
Recover, Conduct Final AARs and Assess Training
(also refer to Chapter 5, Evaluate and Assess Training)

4-106. The final step is to assess the training just completed in terms of the collective and individual task proficiencies demonstrated or attained. Sound assessments facilitate later success. OCTs, OPFOR, and evaluators all provide their input to inform the commander’s assessments. AAR and assess key aspects of the event. Begin with the UTP, assess if the planning and preparation were sufficient, and determine if the administrative and tactical support were sufficient to best conduct the training. Ensure all the lessons learned are recorded and preserved for retraining and future use.

Final AAR

4-107. The final AAR should take place as soon as possible following the event. Ideally, this is not the first and last AAR for an event. AARs are conducted as needed during the event. This ensures that events are still fresh in the minds of all the participants, capturing the data as accurately as possible. Use multiple recorders to ensure all lessons are captured.

KCT Assessment

4-108. Commanders assess and evaluate training. The commander should consider his own observations as well as observations, insights, and lessons from AARs and unit evaluations to inform both KCT proficiency for the assigned mission and METL assessments for USR reporting.

A way to visualize and depict this process is to build a spread sheet, and align each of the mission-focused KCTs with the core capability METs they support; crosswalk the KCT assessments to MET assessments.
SOP Review

4-109. Conduct an SOP review after the event to implement recommended changes gleaned from the observations, insights, and lessons. Quickly implementing the right changes allows the unit to begin improving procedures sooner.

Recovery

4-110. Recovery is a critical part of every training event, and must also be planned to ensure all the resources and personnel are available to complete this task to standard. The recovery process is training. Once recovery is complete, it signifies the end of the training event or operation. Capture AAR comments reflecting the effectiveness of the recovery and modify the SOP. Sample recovery activities your unit should routinely perform following a training event or operation follow:

- Account for personnel health and welfare
- Perform post-operations preventative maintenance checks and services
- Ensure sensitive item accountability
- Ensure accountability of organizational and individual equipment
- Ensure that Class IV, V, TADSS, and other support items are maintained, accounted for, and turned in
- Close out training areas and ranges
- Conduct AARs
- Allow time for the individual soldier to recover personal equipment and conduct personal hygiene
- Conduct final inspections

Additional Supporting Resources (also see the UTM page on ATN)

PDF Leader's Guide to AARs
Video How to Conduct an AAR
Tutorial Recording Assessments in DTMS
Chapter 5
Evaluate and Assess Training
(see also The Leader's Guide to After-Action Reviews (AAR), and appendix D)

In order for the commander to accurately determine the state of training readiness of the unit, bottom-up and top-down input is needed. This allows commanders and leaders to make a timely and precise determination of how well the unit can execute the KCTs – and ultimately the unit mission. Assessments and evaluations are well planned and resourced in advance of training. This ensures a realistic view of the unit at a particular point in time.

Introduction

5-1. A commander assesses training using two techniques: evaluations and assessments. Evaluations are based on the performance of the task(s) measured against the established standard. Training and Evaluation Outlines found on DTMS, ATN or CATS provide the established standards (Go/No-Go) of nearly all collective and individual tasks in the Army. Where no standard has been established, commanders determine what the standard is, and the next higher commander approves it.

5-2. Assessments allow leaders and commanders to take into account the subjective nature of training and develop an overall assessment of the unit’s ability to accomplish its mission. Assessments are done by leaders using their professional observations and other sources to develop an overall assessment of the unit’s ability to accomplish their mission. Additional sources of feedback to consider are:

- Assessment and feedback from higher
- After-action reviews
- Subordinate leader and Soldier feedback
- Evaluator and/or O/C/T comments

Figure 5-1. Example sources of assessments
Assessments vs. Evaluations

5-3. The authority to make a final assessment of a unit’s ability to perform a task or mission lies solely with the commander. Sometimes based on personal and professional observations and instinct (as well as empirical inputs from many other sources), the assessment should answer the basic question: Can the unit perform the task(s) to standard? Assessments are subjective.

5-4. Evaluations are based on the performance of the task(s) against the established standards in T&EOs; they are mainly objective but some subjectivity, especially when considering conditions, invariably creeps into an evaluation.

Evaluations

5-5. Evaluations of training, specifically on the proficiency of the collective and individual task trained, are one of the feedback mechanisms that leaders use to determine if a unit or individual can perform a specific task to the Army standard. They can be executed using internal assets or by an external agency.

5-6. All training is evaluated to measure performance of tasks against the Army standard. The training of tasks during each training event is normally evaluated during the execution phase, but commanders can request evaluations of the planning and preparing phases. Commanders and other leaders secure resources to facilitate the evaluation of the tasks. Leaders use evaluations as an opportunity to coach and mentor subordinates. Evaluations may be informal, formal, internal, external, or any combination of these. One difference not noted in Figure 5-2 is that formal external evaluations are conducted by the headquarters two echelons above the evaluated unit.

<table>
<thead>
<tr>
<th>Informal</th>
<th>Internal</th>
<th>External</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal</td>
<td>Is a function of unit leadership whenever training is conducted. For example, squad leader checks vehicle PMCS.</td>
<td>Is conducted by leaders during visits to training of subordinate units. For example, CSM spot checks Soldiers’ range cards.</td>
</tr>
<tr>
<td>Formal</td>
<td>An evaluation of squad and below proficiency. For example, squad leaders evaluate the squad individual collective tasks.</td>
<td>An evaluation of unit proficiency. For example, battalion evaluates platoon training events.</td>
</tr>
</tbody>
</table>

Figure 5-2. Formal and informal evaluations

Training Evaluation

5-7. Evaluation of individual and small-unit training normally includes every Soldier and leader involved in the training of the tasks. For large-scale training events, evaluators sample a
number of individuals and subordinate organizations to determine the likelihood of the entire organization performing specific mission essential tasks to standard.

5-8. During and after formal evaluations, evaluators prepare their findings and recommendations. Evaluators provide reports to the evaluated unit commander and higher commanders as required by the headquarters directing the evaluation. Evaluation documentation can range from an annotated T&EO for an internal training evaluation to a comprehensive report on RC units during AT periods.

5-9. Evaluation ratings are assigned by evaluators and should not be confused with leader assessment ratings. Evaluation ratings are ratings assigned directly to demonstrated task proficiency. Using tasks T&EOs, evaluators observe performance of the tasks and grade the performance “GO” or “NO-GO,” as defined below:

   “GO”: The task or performance step of a task was performed to standard. A rating of GO is normally awarded if all steps in the task are passed.

   “NO-GO”: The task or any performance step in the task was not performed to standard.

5-10. The completed task T&EOs, with written comments, AAR comments, coaching, and mentoring comments provide leaders and Soldiers with immediate and documented feedback on performance. Commanders use the evaluator ratings as a source of input when making their training assessment ratings of T, P, or U for each KCT.

Assessments

5-11. There are three types of assessments. These are: training, organizational and leader.

Training Assessment

5-12. In assessing whether an individual, collective, KCT or METL task is trained to standard, the leader considers whether the specific performance steps and measures of the task are satisfactorily demonstrated. An example is the T&EO of any individual or collective task. The “go”, no-go” evaluations of each step are aggregated by the observer, to ultimately render the overall assessment of the ability of the unit/individual to perform the task to standard. In the case of KCT and METL tasks, these are assessed only by the unit commander and based on the multiple inputs described earlier, to include personal observations and experience.

5-13. All tasks are assessed using the measure of “T”, “P”, or “U”. This can be applied to individual tasks, collective task, KCTs and METL tasks.

   T (trained): The unit/individual is trained and has demonstrated proficiency in accomplishing the task to the Army standard. The leader judges task performance to be free of significant shortcomings. Training on “T” tasks is designed to sustain proficiency on that task.
P (needs practice): The unit/individual can perform the task with some shortcomings. Performance has demonstrated that the unit does not achieve the standard without some difficulty or has failed to perform some task steps to standard. The shortcomings are not severe enough to require complete retraining. Only retraining on specific steps is required.

U (untrained): The unit/individual cannot demonstrate task proficiency. The leader prepares a comprehensive plan to train all supporting tasks not executed to standard. Unless the task is a newly published METL task, a rating of “U” indicates a serious training deficiency.

Organizational Assessment

5-14. Organizational assessment is a process used by Army senior leaders to analyze and correlate evaluations of various functional systems, such as training, logistics, personnel, and force integration, to determine an organization’s capability to accomplish its wartime mission. It is applicable to battalion and above and is based on an aggregate of multiple evaluations. These assessments contribute to the Unit Status Report.

Leader Assessment

5-15. A commander’s assessment must take into account the proficiency of the unit’s leaders. Unit commanders should take every opportunity to deliberately observe and assess subordinate leaders. Training provides excellent opportunities to grow and develop leaders throughout the unit. Commanders create an environment that encourages on-the-job learning and encourages leaders to take risks and make honest mistakes in order to enhance the developmental process.

5-16. When developing a leader development plan, commanders take into account the following:

- The commander’s leadership philosophy
- The commander’s goal for leader development (to include how he/she plans to assess subordinate leaders)
- Professional development focus areas
- The leader tasks that support the unit KCT/METL (found in T&EOs)
- Leader certification programs

Assessment Planning

5-17. As part of the UTP, commanders ensure an assessment plan is developed that meets the following criteria:
• Fixes responsibility within the staff and subordinate units for gathering and analyzing evaluation data and preparing recommendations

• Concentrates on the effectiveness of leader and unit training

• Uses the CSM/1SG and other senior NCOs to gather feedback on individual, crew, and team training

• Allows the higher commander to monitor outcomes and take action to reshape priorities, policies, or plans to overcome training weaknesses and sustain demonstrated strengths

5-18. Commanders assemble as much information as they can about a unit’s performance and its ability to accomplish to standard the KCTs selected to train during a training event. These are often compiled – as is commonly done following a CTC rotation (CTC take-home packages are an excellent source of feedback), or by other units if training is conducted at home station. A few important sources of feedback for the senior commander’s assessment of the unit’s ability to accomplish missions are noted below:

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<thead>
<tr>
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<th>Deployment exercises</th>
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<td>Assessment and feedback from higher</td>
<td>Maintenance and log evals</td>
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<td>Staff visit reports</td>
<td>IG and special inspections</td>
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<td>Unit status reports</td>
<td>Army Audit Agency reports</td>
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<td>Training briefings</td>
<td>Warrior Task &amp; Battle Drills</td>
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</tbody>
</table>

**After-Action Review (AAR) Overview** (see also appendix D, and *The Leader’s Guide to After-Action Reviews*)

“An after-action review is a guided analysis of an organization’s performance, conducted at appropriate times during and at the conclusion of a training event, with the objective of improving future performance. It includes a facilitator, event participants, and other observers.”

ADRP 7-0

5-19. The AAR is a structured review process that allows training participants to discover for themselves what happened, why it happened, and how it can be done better. The AAR is a professional discussion that requires the active participation of those being trained. The AAR is not a critique. It has the following advantages over a critique:

• Focuses directly on training objectives

• Emphasizes meeting collective and individual tasks to the Army standard rather than judging success or failure
• Uses leading questions to encourage participants to self-discover important lessons from the training event

• Allows a large number of Soldiers and leaders (including OPFOR) to participate so that more of the training can be recalled, and more lessons learned can be shared

5-20. AARs consist of four parts

1. Review what was supposed to happen (training plan). The evaluator, along with the participants, reviews what was supposed to happen based on the commander’s intent for the training event, unit training plan, training objectives, and applicable T&EOs. Ideally, the leader of the evaluated unit conducts the AAR, with assistance from the evaluator or OCT.

2. Establish what happened. The evaluator and the participants determine what actually happened during performance of the training task. An accurate account is vital to the effectiveness of the discussion that follows. For force-on-force training, OPFOR members assist in describing the flow of the training event and both BLUFOR and OPFOR discuss training outcomes from their respective points of view.

3. Determine what was right or wrong with what happened. The participants describe the strong and weak points of their performance. The evaluator or OCT plays a critical role in guiding the discussions so that conclusions reached by participants are doctrinally sound, consistent with Army standards, and relevant to the unit mission.

4. Determine how the task should be done differently next time. The evaluator or OCT assists the chain of command undergoing the training to lead the group in determining exactly how participants will perform differently the next time the task is performed. This results in organizational and individual motivation to conduct future sustainment training to standard.

Additional Supporting Resources (also see the UTM page on ATN)

Tutorial  Recording Assessments in DTMS

Tutorial  Finding Tasks and Using T&EOs

Video  Training & Evaluation Outlines (T&EO)

PDF  Leader’s Guide to AARs

Video  How to Conduct an AAR
Appendix A

Delivering Quality Training

Purpose

A-1. Between the years 2005–2010, the Army adopted a top-down approach to training units. Units deploying in and out of theater were provided theater-specific training with almost unlimited resources. Today, the Army faces a more responsible and fiscally constrained environment. More importantly, the Army is moving back to a commander-centric training regimen where the commander is at the center of determining what the unit must train. The principles of quality training are provided to help commanders and leaders deliver the most efficient and effective means to deliver training to their units and Soldiers.

Overview

A-2. The principles of quality training are closely related and intermingled with the principles of training and leader development. They consider and integrate more fully the principles of mission command and leader training. They are designed to stir deeper thought, analysis and creativity beyond a lock-step process for developing training plans and training events.

A-3. While the development of the UTP and execution of the T-Week concept (as well as employing the enablers of ATN, DTMS and CATS) represent the “science” behind UTM, the principles of quality training may be considered the “art” of delivering the best, most effective training for the unit. The commander must concurrently execute the T-Week process while both constantly assessing his unit and analyzing the plan using the principles of quality training to achieve the best results.

A-4. The principles listed below were developed for commanders, but can be used by leaders at all levels. Use them to analyze each training event developed and analyze if the event planned incorporates every principle listed.

A-5. Every Soldier can reflect on training events they have witnessed that were either not to standard, poorly managed, or not assessed and lessons learned never incorporated. Additionally many training events never meet published Army task standards (T&EO), or simply are not challenging or realistic. This results in valuable training opportunities missed that could have taken the unit/Soldiers to higher levels of task mastering beyond basic proficiency.

A-6. The result of applying the principles of quality training is that every training event considers the audiences’ current level of proficiency and results in the highest levels of proficiency possible given the time and resources available.

Principles of Quality Training

- Commander driven
- Protected
- Trains leaders as the first priority
- Led by trained leaders
• Purposeful, prioritized and linked to mission
• Tailored to drive initiative and adaptability
• Multiechelon, combined arms always
• Resourced and realistic
• Physically and mentally challenging
• Supported by rehearsals, leader recons. PCC/PCIs, retraining, and recovery
• Assessed by commanders and leaders

Figure A-1. Principles of quality training

Commander Driven

A-7. Quality training is commander-driven. Commanders are responsible for all training that occurs in their units. Commanders must be present, visible, engaged and fulfilling their role at training. If it is their training event - they command it. At a subordinate’s event, they assess it. At a higher event they support it. Commanders actively display the behaviors that they require of their subordinates. While commanders are the unit’s primary training manager, subordinate leaders have responsibility for the proficiency of their respective organizations and subordinates.

A-8. Unit commanders lead and assess training to ensure it is mission-focused and done to standard. Effective commanders use the same principles of mission command found in ADP 6-0 to build learning organizations and empower subordinates to develop and conduct training at the lowest possible echelons. Commanders’ help subordinates recognize their individual strengths and weaknesses, encouraging and supporting individual self-development programs. Commanders exercise mission command to give subordinates latitude in determining how to train their units to achieve the desired end-state.

A-9. Per the principle of “train as you will fight”, commanders and other leaders exercise mission command in training just as in operations. They provide the commander’s intent to subordinates, who then determine how to achieve it. Leaders encourage initiative and innovation in their subordinates by allowing them to determine the most effective ways to achieve the standards and meet training objectives. Commanders ensure their subordinate leaders have the necessary skills and knowledge to manage training and achieve desired levels of readiness and attain the proficiency as visualized and described in the unit’s UTP. They ensure their units are capable of accomplishing their missions.

Protected

A-10. The training briefing produces a “contract” between the senior commander and the subordinate commander. Based on this contract, the senior commander agrees to provide resources, including time, and to protect the subordinate unit from un-programmed taskings, or other training distractions. To provide quality training, commanders must enforce and
protect the time allocated for training and establish a command climate that protects scheduled training from any interference.

A-11. Subordinate commanders are responsible to execute the approved UTP and conduct training to standard. Senior commanders create a climate of stability and predictability throughout the organization by protecting approved training plans from training distracters. Additionally, time management cycles are designed to protect training time for subordinate units.

A-12. Time management cycles (like green-amber-red) are critical to an environment of predictability that helps protect scheduled training periods. In order to be effective, commanders at all levels must enforce time management cycles throughout the command – whatever system works best for the unit. Without the support of the entire chain of command enforcing time management cycles, companies, platoons, and Soldiers will not be afforded unhindered time to train. Time management cycles reduce the likelihood that non-training requirements from higher headquarters or the installation will affect the unit’s ability to attain mission proficiency.

**Trains Leaders as the First Priority**

A-13. Quality training requires commanders to train leaders as a first priority. It is their duty to train leaders how to fight and how to train. Commanders also teach Soldiers and leaders how to think, not what to think. They mentor, guide, listen to, and “think with” subordinates. They train leaders first to plan training in detail, prepare for training thoroughly, execute training aggressively, properly evaluate training and conduct effective AARs. Training leaders first is an embedded component of every training event. Nothing is more important to the Army than building confident, competent, adaptive leaders.

A-14. Commanders must verify the training proficiency of leaders and trainers to the Army standard before they train their subordinates. Leaders require the earliest training and must become experts capable of training, coaching, and mentoring subordinates. Training leaders develops subordinates, builds confidence and provides an environment that supports initiative and innovation. Training leaders sets the example and is a key component to delivering quality training.

**Led by Trained Leaders**

A-15. Quality training must be led by trained and competent leaders. Commanders establish effective leader certification programs. Are new leaders simply school trained and then thrown into a leadership position and expected to train their subordinates? A better approach is: A leader specific training and mentorship program within the unit that provides experience level appropriate training and certification. This ensures that commanders know when their leaders are ready to take over full responsibility for the training of their subordinate units. Examples include but are not limited to: Platoon Leader/Sergeant check ride programs, Squad/Team Leader check ride, XO certification etc.

A-16. Other certifications are often formalized by the installation or responsible agency. Examples include: Range Safety Officer, Airload Planner, Convoy Commander Certification, Physical Fitness Master Trainer, Master Gunner etc. Refer to the Principles of Leader Development in ADRP 7-0. A trained leader:
• Leads by example
• Takes responsibility for developing subordinate leaders
• Creates a learning environment for subordinate leaders
• Trains leaders in the art and science of mission command
• Trains to develop adaptive leaders
• Trains leaders to think critically and creatively
• Trains leaders to know their subordinates and their families

Multiechelon, Combined Arms Always

A-17. Multiechelon training is a training technique that allows for the simultaneous training of more than one echelon on different or complementary collective tasks. Combined arms training consists of collective training tasks that are jointly conducted by associated warfighting functions and functional units. Example: An infantry unit would require artillery, engineer and other functional support to train to “Conduct a Combined Arms Breach of an Obstacle”. This training technique optimizes the use of time and resources to train more than one echelon, multiple warfighting functions and functional units simultaneously and realistically.

A-18. Commanders ensure subordinate units have the opportunity to train their KCTs during the higher unit’s training event, while still supporting the higher echelon’s training objectives. Planning for these training events requires detailed synchronization and coordination at each echelon. Additionally, units may execute concurrent training on tasks not directly related to the training event during down time to make the most efficient use of available training time.

Resourced and Realistic

A-19. Commanders ensure training is resourced and realistic. These are key components of the operations process as the UTP is developed and as training events are planned and executed. Soldiers and units thrive on challenging, realistic training that is well planned and well led. In order to do that, commanders diligently ensure that the resources to make training realistic and challenging are available when needed. Senior commanders have a special commitment to the unit to ensure that needed training resources for subordinate units are available and interact with installation/home station agencies to resolve any resource issues affecting training.

Purposeful, Prioritized and Linked to Mission

A-20. Developing the UTP using the operations process provides purposeful and prioritized training that is linked to the mission. KCTs provide the training tasks (and focus) required to achieve mission proficiency. Once KCTs are approved, the commander uses his staff to develop, analyze, compare, and approve a course of action that becomes the unit’s training COA. The training COA consists of purposeful and prioritized KCTs logically pooled into crawl-walk-run training events laid out over time.
A-21. This training COA becomes the UTP and is approved by the higher commander during the Training Briefing. The UTP is the base OPLAN that defines the ends (specific KCT to be trained to improve and sustain training proficiency), outlines the ways (specific training objectives linked to sequenced training events to achieve those ends), and allocates the means (resources to execute the ways). Subordinate commanders, staffs, officers, and NCOs have the responsibility to decide “how” to execute the training COA.

**Physically and Mentally Challenging**

A-22. Quality training is comprehensive. It includes more than tactical and technical competence. Although these skills are essential, a training program developing leaders should also enhance self-awareness, adaptability, conceptual, interpersonal, physical, mental, and emotional competence. Quality training is intellectual, physical, and moral in nature. It is intellectual, because of the unique body of expertise required in military operations is extensive. It is physical, because of the very real physical demands required to apply force to defeat an opponent. Combat operations are tough, and training must be done under the most difficult and realistic conditions in order to properly prepare units. It is moral, because units and Soldiers must be prepared to face the many different moral challenges on the battlefield.

A-23. Quality training seeks to attain not just minimal task proficiency, but seeks to master the task. This is done by leaders repeating task execution, incrementally improving Soldier performance and ultimately executing the task beyond minimum standards. This is also accomplished by changing the conditions that the task is performed. For example, a task conducted during the hours of daylight can be trained under the hours of darkness, or on unfamiliar terrain, or against different OPFOR tactics.

A-24. Tough, realistic, and intellectually and physically challenging training excites and motivates Soldiers and leaders. Physically and mentally challenging training builds competence and confidence, and instills loyalty and dedication to the unit through a shared sense of accomplishment. It inspires excellence by fostering initiative, enthusiasm, and eagerness to learn.

**Supported by Rehearsals, Leader Recons, PCC/PCIs, Retraining, and Recovery**

A-25. Quality training is supported by rehearsals, leader recons, PCC/PCI, retraining, and recovery.

**Rehearsals**

A-26. A rehearsal is an event in which one or more members of a unit practice, recite, recount, repeat, or drill a set of tasks or procedures to prepare for a formal performance. It is a training technique used to ensure team members understand what they and other members of the team must accomplish to perform a task successfully. There are five types of rehearsals that vary by degree of required resources.
Time/Resources:

<table>
<thead>
<tr>
<th>Decreasing</th>
<th>Increasing</th>
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<tr>
<td>Technique:</td>
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<td>- Map</td>
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<td>- Communications</td>
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<td>- Sand Table/Terrain Model</td>
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<td>- TEWT</td>
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<td>- Rock Drill</td>
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Figure A-2. Rehearsal technique continuum

Leader Recons

A-27. Leaders conduct training site reconnaissance several weeks before execution of the training event. Leaders and trainers recon training areas, ranges, firing points, OPs, and simulation facilities. The purpose of this reconnaissance is to confirm the adequacy and accuracy of the plan prior to training, help prepare for rehearsals, and prepare for other training activities prior to the exercise. Recons provide leaders and trainers the opportunity to know the terrain and prepare for employment of assets to support the tactical training objective, specific KCT training areas, AARs, sustainment activities, transportation and communication networks.

Pre-Combat Checks/Pre-Combat Inspections (PCC/PCI)

A-28. PCC/PCIs are procedures, usually using checklists, employed to ensure that all planning and prerequisite training (Soldier, leader, and collective) has been conducted prior to the execution of training. More specifically, pre-combat checks are detailed final checks that all units conduct before and during execution of training and combat operations as part of the troop leading procedures. They are also conducted at the beginning of each event or exercise.

A-29. Although pre-combat checks start in garrison, some checks may be completed in the assembly area or in the battle position; for example, applying camouflage, setting radio frequencies, and distributing ammunition. Pre-combat inspections validate that the pre-combat checks have been performed. The leader must plan his time and that of his unit's to ensure that inspections are performed. Time must also be available for corrective actions should an individual or item fail the inspection. The leader cannot delegate this responsibility; he must be the inspector. This demands that he/she be competent in the maintenance and care of all of unit equipment. The standards set determines the unit's ability to perform in actual operations.

Retraining

A-30. Quality training includes programming time to retrain/retry tasks during or after training events. It is best to retrain immediately while lessons learned are fresh and to conserve resources like equipment, personnel and resources on hand. Training should not progress to the next proficiency level unless training objectives are met. Leaders should not delay
retraining except when absolutely necessary. If the leader delays retraining, Soldiers must understand that they did not perform the task to standard and that retraining will occur later. Time or the complexity of the mission may prevent retraining on some tasks during the same exercise. When this happens, leaders must reschedule the mission or training in accordance with the UTP.

**Recovery**

A-31. The recovery process is training and, once completed, signifies the end of the training event. While recovery tasks vary depending on the type and intensity of training, most include maintenance training, turn-in of training support items, inspection of equipment, and the conduct of AARs that review the overall effectiveness of the training just completed. The following is a sample list of recovery activities:

![Training Execution Diagram]

**Assessed by Commanders and Leaders**

A-32. Quality training is assessed by commanders and leaders. Training assessment starts before mission analysis during the development of both the UTP and individual training events. The assessments serve as a measure from which the commander can shape future training. The commander uses his training assessments to determine and focus the tasks he wants to train and expresses these for each training event as training objectives. For the tasks that are assessed as Trained (T), the commander schedules sustainment training. For those with lesser ratings of Needs Practice (P) or Untrained (U), the commander schedules training that ultimately progresses to a “T” assessment (see Chapter 5 for further details).
Performance-oriented

A-33. Quality training is performance-oriented. Can the Soldiers or the unit perform the desired task(s) to standard, under realistic conditions that replicate the OE for which they are training? Performance-oriented training is hands-on and conducts the task under the conditions and to the standard specified. Soldiers learn best through repetition, using a hands-on approach. Soldiers train better, faster, and to a higher degree of proficiency when they know the task, conditions, and standards. Likewise, training is more effective when it is performance-oriented and standards-based.

Tailored to Drive Initiative and Adaptability

A-34. Commanders consistently review the training conditions, difficulty, and intensify for each training event and within each training event to provide the right training to develop initiative and adaptability. Key to building these characteristics is developing confidence and competence within the team. Training experiences, coupled with organized and timely feedback, build competence. Leaders build unit, staff, and Soldier confidence when they consistently demonstrate competence under unpredictable and stressful conditions. Competence, confidence, and discipline promote initiative, confidence and enable leaders to adapt to changing situations and conditions.

A-35. Commanders challenge their leaders to improvise with the resources at hand, exploit opportunities, and accomplish assigned missions under complicated conditions, when the situation is not clear and no further orders are available to the leader. Leaders must be able to accomplish the mission with only the commander’s intent and concept of the operations. Commanders underwrite honest mistakes, reward innovation and initiative, and create an environment to aggressively correct training deficiencies through retraining. Commanders integrate training events and specific training exercises in their training plans to develop and train imaginative, adaptive leaders and units. Commanders vary training events and exercise scenarios to:

- Reflect the uncertainty inherent in conducting unified land operations
- Provide mission command experience
• Develop subordinates’ understanding of commander’s “intent” and “concept of operation” two levels up

• Encourage use of mission orders and promote initiative

• Develop decentralized decision making and execution

Summary

A-36. Quality training enables units to efficiently and effectively achieve mission proficiency. Quality training is how the Army to achieve agile, innovative, and adaptable units, leaders and Soldiers.
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Appendix B
Leader Development

Purpose

B-1. Leader development should not be left to chance. Leaders are developed in operational units as the unit trains. The UTP and the training events that populate it are the primary venue for unit leader development. Although leader development programs (like OPD/NCOPD) can, and should, supplement the unit’s leader development plan, they should not be the sole mechanism a unit uses to develop its leadership.

B-2. Senior leaders are responsible for determining how they develop their subordinate leaders. By reviewing unit training events, the senior leader can begin planning how he/she will use these events to focus on improving and sustaining subordinate leader performance (improving weaknesses and sustaining strengths).

B-3. The following diagram shows a simple evolution of how a senior leader uses a training event from the UTP to plan for evaluating subordinate leader performance. By aligning the training event with individual leader training objectives, the senior leader begins to formulate a viable plan to improve each subordinate leader’s skills as each executes tactical and technical tasks during an FTX.

Figure B-1. Using training events from the UTP to plan individual leader development

B-4. This appendix provides information on how leaders can train their subordinate leaders to grow as leaders themselves – as the unit trains. It builds on the training and leader development principles, idea and concepts discussed in ADP 7-0, ADRP 7-0 and ADRP 6-22.

Overview

B-5. Because it deals directly with Soldiers, leadership is the most dynamic element of decisive action. Confident, audacious, and competent leadership focuses leaders and serves as the catalyst that creates conditions for success. Leaders who embody the warrior ethos inspire Soldiers to succeed. They provide purpose, direction, and motivation in all operations. Leadership is key and the actions of leaders often make the difference between success and failure, particularly in small teams, staffs, and units.
B-6. Commanders are responsible for training and developing subordinate leaders. This responsibility is important to the collective readiness and warfighting competence of their teams, staffs, and units, as well as to the individual's long-term development. Army warfighting doctrine recognizes leadership as an essential element of combat power. Commanders cannot leave leader training and leader development to chance. They must deliberately plan, prepare, execute, and assess leader training and leader development, just as they do for collective tactical and technical training and other individual training.

B-7. Leader training and leader development occurs in the institutional, operational, and self-development domains. Leader training focuses on attaining the competence (knowledge, skills, and abilities) required for a leader's current duty position and level of responsibility, whereas leader development focuses on attaining the competencies required to perform increased responsibilities in the future. Leader training is just one portion of leader development. Leader training is driven by specific requirements and competency development.

B-8. The ultimate goal of the Army's leader training and leader development programs is to develop leaders who are self-aware, adaptive, competent, and confident.

B-9. Leader training and leader development programs are successful when commanders effectively communicate the purpose and intended outcome to subordinate leaders. A critical component of that communication process is imparting the terms of reference for leader training and leader development. Understanding the meaning of the concepts and definitions the Army uses to describe leader training and leader development is essential for planning and executing a unit development plan that trains leaders while simultaneously developing them for future responsibilities.

Definitions (see also ADRP 6-22)

B-10. Leadership: The process of influencing people by providing purpose, direction, and motivation to accomplish the mission and improve the organization.

B-11. Leader development: A deliberate, continuous, sequential, and progressive process, grounded in Army values. It grows Soldiers and Army Civilians into competent, confident leaders capable of directing teams and organizations.

B-12. Mentorship: The voluntary developmental relationship that exists between a person of greater experience and a person of lesser experience that is characterized by mutual trust and respect (AR 600-100).

Concepts

B-13. Developing agile and adaptive leaders: Leaders must develop an agile and adaptive mindset. Developing agile and adaptive leaders requires scenarios, opposing forces, and supporting training aids, devices, simulators, and simulations (TADSS) to fight realistically in a training environment. This mindset can be achieved by—

- Conducting leader training and leader development focused on executing fewer events with more increasing levels of complexity.
- Training combined arms at the lowest level.
Empowering junior leaders to plan and conduct more training, and allowing them to develop creative solutions and ideas through decentralized execution. Leaders should add uncertainty and friction throughout all training events. The essence of leader success is being able to identify and adjust to completely new conditions rapidly, and to accomplish the mission with minimum disruption in the operation.

B-14. Competencies: Competencies are not the technical requirements or specific knowledge and skills needed to perform a particular job. Rather, they are characteristics that indicate performance success across a variety of tasks and environments in an organization. Competencies are usually not directly observable—they show themselves through actions and behavior. Leaders lead soldiers and units into uncertain, ill-defined, and ever-changing operating environments using the foundation of broad-based leader competencies.

B-15. Self-awareness and adaptability: The ambiguous nature of the operational environment requires Army leaders who are self-aware and adaptive. Self-aware leaders understand their operational environment; they can assess their own capabilities, determine their own strengths and weaknesses, and actively learn to overcome their weaknesses. Adaptive leaders must first be self-aware; then have the additional ability to recognize change in their operating environment, identify those changes, and learn how to adapt to succeed in their new environment. Self awareness and adaptability are linked. A self-aware leader who is not adaptive cannot learn to accept change and modify behavior brought about by changes in the environment. However, adapting without self awareness is changing for change’s sake—without understanding the relationship between abilities, duties, and the environment.

B-16. Inculcation of the warrior ethos: leaders have the responsibility to embody the warrior ethos and to instill that disposition in their subordinates. The warrior ethos forms the foundation for the American Soldier’s spirit and total commitment to victory, in peace and war, always exemplifying ethical behavior and Army Values. Soldiers put the mission first, refuse to accept defeat, never quit, and never leave behind a fellow American. Their absolute faith in themselves and their comrades makes the United States Army invariably persuasive in peace and invincible in war.

B-17. Self-development: The self-development domain in the Army’s leader development model (see ADRP 7-0) defines a critical area where self-development training occurs. Understanding how the self-development process occurs focuses on creating professionals who are constantly challenging and improving themselves. This domain is a self-directed, competency-based, progressive, lifelong process leaders use to augment institutional training and unit experience to attain proficiency at their current rank/assignment, and to prepare for promotion and higher-level responsibilities. Self-development is an individual responsibility, assisted by first-line leaders and commanders, to identify training requirements based on assessment and feedback. Development activities are planned to meet specific individual training goals and needs. The Army also assists the individual in his or her self-development by providing the training and education products for the individual to learn—specifically, Training Support Packages (TSP), assessment tools, reach-back and reach forward capabilities, professional reading programs, and tuition assistance.
B-18. Lifelong learning: Lifelong learning is the individual, lifelong choice to pursue knowledge, the comprehension of ideas, and the expansion of depth in any area actively in order to progress beyond a known state of development and competency.

B-19. Leaders—as members of the profession of arms—are responsible for maintaining and expanding their professional knowledge. They must accept and commit to lifelong learning as a key leader development strategy. This strategy must integrate training and education content and materials with operational experiences, assessments, and feedback to ensure effective learning of required skills, knowledge, and abilities. The single most critical element of lifelong learning is feedback. Feedback sets the basis for increasing self-awareness and identifying individual leader development needs.

B-20. Assessment and feedback: Assessment and feedback are key to developing competent, confident, self-aware, and adaptive leaders who can see first, understand first, act first, and finish decisively. An important factor in growing leaders is implementing and sustaining an assessment and feedback process at all levels of leadership and in the three domains of leader development (institutional, operational, and self-development). To be effective, this assessment and feedback process must be formal and informal and must be reinforced with feedback through counseling and coaching. It must also include situational exercises and experiential learning. Formal assessment and feedback tools help improve leader skills. Assessments facilitate leader development, promote self awareness and adaptability in leaders, and enhance leaders’ skill in building morale, teamwork, and cohesion. The results support improvement in the individual, the organization, and the Army.

**Commander’s Responsibility for Leader Training and Development Programs**

B-21. Commanders are responsible for leader training and leader development programs in their units. They alone are responsible for providing a climate in which learning can take place. These programs are for all officers, noncommissioned officers, and civilians in
leadership positions. They help ensure that leaders are trained for current assignments, are exposed to a variety of perspectives, and are prepared for future positions.

B-22. Commanders enhance leader development by evaluating unit training plans and ensuring that leaders are first trained to execute leader tasks to standard before they engage in collective events. Operational demands require leaders at all levels to apply their individually-developed competence to enable teamwork. Very-high performing leader teams must develop teamwork, team decision making, and team leadership. The development of these abilities starts with comprehensive leader training and leader development programs in units that create confident leaders and Soldiers.

B-23. Commanders are also responsible for the safety of their units. They are obligated to embed safety into the conduct of all operations and to ensure that subordinates execute risk management. The commanders fulfill this responsibility during the preparation phase of training by conducting a leader’s reconnaissance and risk assessments, and by following the risk management process. During the training execution phase, continual assessment and management of risk helps the commander make informed decisions.

B-24. Requirements ultimately drive a commander’s decision regarding a leader’s assignment. However, the commander should progressively prepare the leader for new assignments by assigning him or her more complex and demanding duties—but should not overwhelm him or her. The commander should base reassignment on the leader’s level of development and demonstrated potential. Commanders also assess leader performance against the Army standard and leader competencies, and provide the leaders with information on strengths, weaknesses, and development needs. Finally, commanders create conditions for success and assist leaders in their preparation to achieve maximum growth.

B-25. Leader training programs are mission-focused and consist of individual or position-level (for example, all platoon leaders) training plans that ensure that leaders are competent in their current duty positions. Units may want to focus leader training on specific designated tasks. Leader training can include OPD, NCODP, and training programs that are based on an evaluation of supporting leader tasks for KCT, or METL tasks that will be trained in the future.

B-26. Leader development programs, such as officer professional development (OPD) and noncommissioned officer professional development (NCOPD), prepare leaders for increased responsibilities. The central element of a leader development program is an individually structured leader development action plan. The leader development action plan should be an individual assessment and implementation plan created jointly by the individual and the rater. Counseling and evaluation support forms are used to document this process. The leader development action plan should have a process to adapt to the changing needs of the leaders being developed. The commander should assess and provide feedback in accordance with counseling guidelines. Commanders should design leader development programs with the following characteristics:

- Mission-focused. Focus on the leaders abilities to train, deploy, and lead their soldiers and units in combat. Consider the future and systematically develop skills and attributes successful leaders require in follow-on assignments.

- Comprehensive. Include more than tactical and technical competence. Although these skills are essential, a program to develop leadership potential should also enhance self-awareness; adaptability; conceptual,
interpersonal, physical, mental, and emotional competence; and it should clarify and enrich the expected values for leaders of character.

- Inclusive. Apply to all leaders in the unit, from the newest corporal to the unit commander and CSM. Regardless of the level of expertise and experience, leaders are never completely developed—they are continually developing.

- Supportive. Include individual self-developmental goals. Support individual goals identified (and linked to unit training and readiness) in developmental action plans whenever possible. Leaders commit more readily to unit goals that also satisfy their personal goals.

**Leader Training and Leader Development Action Plan**

B-27. The leader training and leader development action plan consists of three phases: reception and integration, basic competency development, and leader development and sustainment. Figure B-2 below is an example of a phased individual leader training and development action plan. The plan can be expanded or modified in order to conform to the organization’s KCT/METL or individual requirements.

| Key Elements of a Leader Training and Leader Development Action Plan |
| --- | --- |
| Reception and Integration Phase | Basic Competency Training Phase |
| - Record review prior to arrival  
  - Initial Interview—  
    - Discuss duty position.  
    - Discuss previous training and experience.  
    - Discuss individual desires.  
    - Discuss possible future duty positions.  
    - In-process/Personal affairs.  
    - Chain of command interviews and introductions.  
    - Meet subordinates. | - Unit orientation.  
- Unit history, mission, SOPs, special equipment available TADSS.  
- Unit certification program and diagnostic evaluation.  
- Identify strengths and weaknesses.  
- Focus initial training on duty position competencies.  
- Identify near-term training requirements. |

| Leader Development and Training Sustainment Phase |  |
| --- |  |
| - Establish sustainment plan for critical skills mastered.  
- Establish training plan for individual proficiency areas requiring improvement.  
- Establish plan for future development—  
    - Special/additional duties progression.  
    - Schools or courses required.  
    - Exposure to new tactical or technical procedures. | - Prioritize training needs for skills and tasks requiring improvement.  
- Identify additional or advanced competencies required for duty position.  
- Draft projected self-development needs. |

|  | Create self-development program—  
- Near-, short-, and long-term objectives.  
- Current and future duty positions.  
- Military and civilian schools. |

Figure B-3. Key elements of a leader training and leader development action plan.
Reception and Integration Phase

B-28. Here are the basic steps to this phase:

- Record review prior to arrival
- Initial interview:
  - Discuss duty position
  - Discuss previous training & experience
  - Discuss individual desires
  - Discuss possible future duty positions
- In-process/personal affairs.
- Chain of command interviews and introductions.
- Meet subordinates.
- Unit orientation
- Unit history, mission, SOPs, special equipment, available TADSS
- Unit certification program and diagnostic evaluation
- Identify strengths & weaknesses
- Focus initial training on duty position competencies
- Identify training requirements (focus on KCTs and UTP requirements)

Basic Competency Training Phase

- Complete applicable unit certification
- Meet standards for all duty position skills and tasks
- Establish C2 relationships with higher and lower individuals/units
- Review progress of 4-6 week training objectives
- Prioritize training needs for skills and tasks requiring improvement
- Identify additional or advanced competencies required for duty position
- Draft projected self-development needs.
Leader Development and Training Sustainment Phase

- Establish sustainment plan for critical skills mastered
- Establish training plan for individual proficiency in areas requiring improvement
- Establish plan for future development:
  - Special/additional duties progression
  - Schools or courses required
  - Exposure to new tactical or technical procedures
  - Create self-development program
    - Near, short, and long-term objectives.
    - Current and future duty positions
    - Military and civilian schools

Reception and Integration Phase

B-29. Prior to the arrival of new leaders, the commander or key NCOs review the officer record brief (ORB), or the enlisted record brief (ERB). The commander or CSM/1SG interviews the new leader as soon as the leader arrives to define the training and developmental requirements clearly. They discuss the leader's assigned duty position, previous experience, training, education, personal desires, and possible future assignments.

B-30. In addition to the records review and interview, the commander or CSM/1SG may use a diagnostic test to identify the new leader's strengths and weaknesses. Units also use training programs to ensure that leaders are trained to the Army standard to serve in potentially hazardous and high-impact leadership positions. An example is certifying a leader to perform the duties of a range OIC or NCOIC. The information gathered during the reception and integration phase is used to design a formal training and developmental program tailored to the individual leader's requirements. After the interview with the commander or CSM/1SG, the leader participates in the unit orientation and the development of the leader training and leader development action plans.

Basic Competency Training Phase

B-31. The leader then progresses to the second phase of the program, the basic competency training phase. This phase occurs within the first few months. It ensures that the new leader attains a minimum acceptable level of competency in the critical skills and tasks necessary to perform the mission. The responsibility for this phase lies with the rater, assisted by other key officers and NCOs in the unit.
Leader Development and Training Sustainment Phase

B-32. The last phase is the leader development and training sustainment phase. This phase involves sustaining those tasks already mastered and developing proficiency in new competencies. The commander develops the leader by using additional duty assignments, and technical and professional courses to broaden the leader's perspective and skills for future duties.

B-33. Also during this phase, the leader starts a self-development program. It is designed with the assistance of the commander and senior NCOs. Together, they prioritize self-development goals and determine courses of action to improve individual performance. Self-development starts with a competency-based assessment of previously acquired skills, knowledge, and experience. The leader then identifies his or her strengths, weaknesses, and development needs. Goals are categorized into near-term, short-range, and long-range actions and efforts. Initial goals are remedial and focus on correcting weaknesses that adversely affect performance of current duty assignment requirements. Interim goals focus on acquiring skills, knowledge, and experience needed for the next operational assignment. Long term goals focus on preparing soldiers and leaders for more complex duties beyond their next operational assignment.

B-34. Future assignments are important in a leader's action plan. The commander uses assigned duties to assess performance and provide junior leaders with the experience and feedback required for professional and personal development. The commander should know his or her leaders so well that the commander can identify when they have mastered their current assignment responsibilities and either increase their responsibilities, expose them to developmental activities, or move them to positions of greater responsibility, as appropriate.

Summary

B-35. Every leader has a professional responsibility to train and develop subordinates and himself or herself continually. All leaders should deliberately plan and execute subordinate leader training and leader development. Training and developing leaders requires investing in their long-term professional development while balancing the short-term mission essential operational requirements of the unit. The long-term development of leaders is the focus. It is a responsibility shared by the leader, the direct supervisor, the commander, and the Army. There is no greater or longer-lasting contribution a commander can make to improve the unit and shape the future of the Army than to train and develop future leaders.

Additional Supporting Resources (also see the UTM page on ATN)

PDF Commander's Guide to Leader Development

PDF ADRP 6-22, Army Leadership
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Appendix C

Organization Inspection Program (OIP) for Training

Purpose

C-1. Unit Training Management (UTM) should be a subset of the unit’s overall Organizational Inspection Program (OIP). This document will provide the training management inspector with the basic overarching program and then drill down into the specifics for training management. Much of the program description is drawn from AR 1-201, Army Inspection Policy.

Guidance for Inspectors

C-2. All inspections have one purpose: to provide feedback to commanders so they can make decisions that will improve the Army. The focus must remain on measuring compliance against established standards to ensure that the Army as a whole can function effectively in its combat role. The five principles of Army inspections support the five basic elements of an inspection. Those five elements are:

a. Measure performance against a standard
b. Determine the magnitude of the problem(s)
c. Seek the root cause(s) of the problem(s)
d. Determine a solution
e. Assign responsibility to the appropriate individuals or agencies

Checklist Structure

C-3. Section I provides the inspector with a checklist for identifying training management processes in the unit. The presence of these processes imply that the unit has an understanding of the doctrine and contains the parts essential for planning, preparing, executing and assessing unit training.

C-4. Section II is targeted toward an evaluation of the indicators of an effective training management program. It provides indicators of specific inspection items which allow for a more detailed assessment. The second section may require multiple observations of training planning, preparation, and execution in order to provide an accurate review of the unit’s training program effectiveness.
References:

1. ADP 7-0 (Training Units and Developing leaders), (AUG 12)
2. ADRP 7-0 (Training Units and Developing Leaders), (AUG 12)
3. ADRP 6-22 (Leadership), (AUG 12)
4. AR 350-1 (Army Training and Leader Development), (18 DEC 09)
5. AR 525-29 (Army Force Generation), (14 MAR 11)
6. The Army Training Strategy, (3 OCT 12)
8. The Leader’s Guide to Unit Training Management (UTM), (DEC 13) https://atn.army.mil)

NOTE: See following pages for Sections I and II checklists
SECTION I - BRIGADE/BATTALION/COMPANY INSPECTION CHECKLIST
This series of questions measure the unit’s training program. These questions will determine whether the foundations of an effective unit training program are present. They are not of itself an indicator of unit training effectiveness. The key to any training program is the commander’s personal involvement. As the unit’s primary training manager, the commander’s direct involvement in the planning, preparation, execution and assessment of training proficiencies ensures compliance with his vision and intent for training. Recommend annual formal inspections with semiannual internal informal inspections. All references should be current published editions (refer to the Army Publishing Directorate (APD) at [http://www.apd.army.mil](http://www.apd.army.mil)).

| REFERENCES: |
|---|---|---|
| 1. ADP 7-0 (Training Units and Developing Leaders) |
| 2. ADRP 7-0 (Training Units and Developing Leaders) |
| 3. AR 350-1 (Army Training and Leader Development) |
| 4. AR 525-29 (Army Force Generation) |
| 5. The Army Training Strategy |
| 6. Army Training Network (ATN) |
| 7. Unit Training Management (UTM) (current on ATN) |
| 8. Combined Arms Training Strategies (CATS) |
| 9. Digital Training Management System (DTMS) |

| SECTION I - BRIGADE/BATTALION/COMPANY INSPECTION CHECKLIST |
|---|---|---|
| This series of questions measure the unit’s training program. These questions will determine whether the foundations of an effective unit training program are present. They are not of itself an indicator of unit training effectiveness. The key to any training program is the commander’s personal involvement. As the unit’s primary training manager, the commander’s direct involvement in the planning, preparation, execution and assessment of training proficiencies ensures compliance with his vision and intent for training. Recommend annual formal inspections with semiannual internal informal inspections. |

<table>
<thead>
<tr>
<th>TASK</th>
<th>SUSTAIN/IMPROVE</th>
<th>INSPECTORS COMMENTS</th>
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<tbody>
<tr>
<td>1. Unit Training Plan (UTP)</td>
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<tr>
<td>• Is the higher headquarters’ Unit Training Plan (UTP) available and posted in Digital Training Management System (DTMS)? (ADRP 7-0, Para 3-31).</td>
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<tr>
<td>• Is the inspected unit’s UTP published? Is it posted to DTMS? (ADRP 7-0, Para 3-32)</td>
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<tr>
<td>• Does the UTP contain:</td>
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</table>
- The higher headquarters’ mission.
- The higher headquarters’ METL.
- The higher headquarters Commander’s training guidance.
- The unit mission.
- The commander’s intent and guidance.
- Key Collective Tasks (KCT).
- A concept of operations that includes—
  - A collective training plan.
  - An individual training plan in support of the collective training plan.
  - A leader development plan.
- A time management cycle.
- Tasks to subordinate units.
- An assessment plan.
- The training operational environment.
- Resources required.
- Risks and mitigation for key tasks not trained.
- Training calendar.

### 2. Commanders’ Dialogue. (ADRP 7-0, Para 3-15)
- Are Commanders ‘Dialogues conducted?
- Are the unit’s KCTs approved by the higher commander (key output of the Commanders’” Dialogue).
- Is the output of the Commanders’ Dialogue recorded?

### 3. Mission-essential task list (METL) (ADRP 7-0 para 3-5)
- Is the unit Mission-essential task list (METL) available? (ADRP 7-0, Para 3-5)
- Is the unit METL posted to DTMS? CATS?
- For Bn/Co, does the unit METL reflect the unit’s as-designed capabilities as described by the TOE/TDA?
- Does the METL nest with and
The unit METL is reportable on the USR. It is a source of information to develop the unit’s Key Collective Tasks (KCT).

### 4. Key Collective Tasks (KCT)

- Are the unit KCTs with latest assessments available? ([ADRP 7-0](https://www.dtic.mil/uuid/7256d046843413b7b29e5ee6), Para 3-13, 3-115)
- Do the KCTs support the unit mission (specified and implied tasks from the higher unit UTP and mission analysis)?
- Do the KCTs crosswalk with the unit METL?

KCTs should be posted in DTMS, reviewed for validity, and revised if given a new mission.

Assessments of KCTs should be made at the conclusion of each training event, normally at the T+1 training meeting at the company-level.

The KCTs must crosswalk to the essential tasks the unit must accomplish and crosswalk to the unit METL as they link to the unit’s design capabilities.

### 5. Training Objectives

- Are training objectives published for each major training event? ([ADRP 7-0](https://www.dtic.mil/uuid/7256d046843413b7b29e5ee6), Para 3-55)
- Do the training objectives support training the unit KCTs for each event?
- Are leader, collective leader, collective and individual tasks objectives identified for each major training event?

Training objectives are an essential part of the commander’s training vision. Overall collective task objectives help sequence training events from simple to increasingly more complex tasks. The progressive nature of the training helps build upon previously mastered skills.

### 6. Training Schedules

- Are the company training schedules approved and signed by the battalion commander?
- Are company training schedules changed frequently?
- Are changes approved by the battalion commander?

(ADRP 7-0, Para 3-65)

Training schedules are necessary to inform Soldiers and leaders and to focus support, project resource requirements and to allow companies optimum time to prepare for training events.

### 7. Training Meetings

- Are company training meetings held at least weekly?
- Do the right personnel attend?
- Are Bde/Bn training resource meetings conducted that support company-level training events/requirements? (ADRP 7-0, Para 3-68)
- Is there a standard training meeting agenda? (ADRP 7-0, Para 3-68)

Training meetings ensure complete training preparation, resource coordination and provide opportunities for training plan corrections and modifications. Necessary to keep the training plan on track and to successfully prepare for training events.

### 8. DTMS

- Does the unit use DTMS?
- Is there a certified DTMS master trainer on hand?
- Does each battalion have a DTMS operator (ALARCT 208-209)?
- Is DTMS used to manage Company-level individual training records (ITRs)? (AR 350-1, Para 3-22, Para F-2)

### 9. Assessment/Evaluation (ADRP 7-0, Para 3-73)

- Does each major training event include an assessment plan?
- Are unit Observer-controller/trainers (OCTs) trained and certified by the unit commander?
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<tr>
<td>Does the unit conduct AARs during and at the conclusion of training events?</td>
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<tr>
<td>Are AAR results available?</td>
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<tr>
<td>Does the unit follow the AAR process as outlined in the <a href="#">Leader's Guide to Company Training Meetings</a>?</td>
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<tr>
<td>Are AAR results provided to the commander and used for assessing KCT/MET task proficiencies?</td>
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<tr>
<td>Are the latest training evaluations/inspection reports available? (<a href="#">ADRP 7-0</a>, Para 3-74)</td>
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<tr>
<td>Does the unit use Training and Evaluation Outlines (T&amp;EO) for collective, individual and leader tasks?</td>
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<tr>
<td>Are T&amp;EOs used for bottom-up feedback that inform the commander’s assessment of KCTs?</td>
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Unit assessment plans help validate the current assessment of the unit KCTs and METs and the UTP.

**10. Training Briefing.** ([ADRP 7-0](#), Para 3-68)

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<tr>
<td>Are Training Briefings conducted?</td>
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<td>Has the unit established a frequency for these?</td>
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<tr>
<td>Are the Training Briefings tied to the higher commander’s approval of the UTP?</td>
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<td>Are the Training Briefing results recorded?</td>
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<td>Are installation staff, supporting unit and gaining commanders present as appropriate?</td>
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**11. Training Resource Management**

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<tr>
<td>a. Training Ammunition.</td>
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<td>Are annual ammunition forecasts available?</td>
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<td>• Does the unit have a plan to use annual forecasted ammunition?</td>
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<tr>
<td>• Are DA form 581s on hand and support the applicable training event?</td>
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<tr>
<td>• Are projected shortfalls addressed during the Commanders' Dialogue and Training Briefing?</td>
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<tr>
<td>• Are Class V handlers certified by the commander?</td>
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<tr>
<td>12. <strong>Live/Virtual/Constructive (LVC)</strong></td>
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<tr>
<td>• Are the right VCG assets considered and used in order to meet training objectives when necessary?</td>
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<tr>
<td>• Has the unit incorporated LVCG assets into the training plan?</td>
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<tr>
<td>13. <strong>Training Aids Devices Simulations and Simulators (TADDS)</strong></td>
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<tr>
<td>• Does the unit incorporate the use of TADDS to support training events?</td>
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<tr>
<td>• Does the unit identify and adequately plan for TADSS that support collective and individual tasks?</td>
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### 14. Time Management

- Has the unit established, or does it follow a higher HQ/installation time management cycle (red-amber-green type cycle)?
- Has the unit established, or does it follow a higher HQ/installation external task "lock-in" program that protects training time from un-programmed requirements?

### 15. Leader Development

- Has the commander established a unit leader development program?
- Is a leader certification program part of the LD program?
- Are leader development training objectives and assessments integrated and identified in each major training event?

### 16. Rehearsals/Pre-Combat Checks

- Does the unit schedule and execute rehearsals prior to each major training event?
- Do all applicable leaders and trainers attend the rehearsals?
- Are Pre-Combat checks and inspections conducted prior to training execution?

### 17. Re-Train Retry

- Does the unit schedule time to re-train_retry tasks not meeting standards?
SECTION II – Evaluation

This section of the OIP allows the inspector to interview leaders throughout the unit to evaluate the effectiveness of training management execution. It evaluates the execution of the operations process outlined by UTM. It allows the inspector to move beyond simply checking the presence of the required elements of the program (Section I) and begin to determine the magnitude of the problem(s), seek the root cause(s) of the problem(s), begin to determine solutions and discover where to recommend responsibility to the appropriate individuals or agencies.

This section is a series of interview-like questions to determine if the program is effective and should be conducted after section one is complete so that the inspector is already aware of any strengths and shortfalls in the presence of the required elements of the training management program.

A. Commander and Leader Responsibilities

This section of the OIP provides the inspector with questions and considerations that can be used to determine if the commanders and subordinate leaders are meeting their responsibilities according to Unit Training Management (UTM). The questions are not all inclusive, but can help the inspector gain a basic understanding and lead to fuller conversation to determine the effectiveness of the program or root cause of any issues.

For commanders at every echelon the following questions apply:

1. Do you use mission command to give subordinates latitude in determining how best to train their units to achieve your visualized end-state for training?

   a. How? (do you provide them training objectives for each training event and/or suspense’s for proficiency levels in their KCTs?) In your words describe the processes.

   b. How do you provide them the training time and resources they require? (Do you use the commanders’ dialogue during development of the UTP? Do you allocate “white space”? When and how do you become involved in resourcing your subordinate commanders and/or leaders?).

   c. How do you ensure your subordinate leaders have the necessary skills and knowledge to manage unit training so that leaders and units can achieve desired levels of training readiness? How do you train your subordinate leaders to use the unit training management system?

2. How do you ensure you are providing quality training to your subordinates? How would you define quality training?
The following questions apply to commanders and leaders at every echelon (select several at each echelon IOT determine if the programs in place are used throughout the command or if there are any systemic problems at certain levels):

How do you:

1. Personally observe, participate in and evaluate the quality and consistency of training at all echelons?

2. Receive training feedback directly from subordinate leaders and Soldiers?

3. Identify, resolve if possible, and bring to the chain of command’s attention, issues in training planning, leadership, management, support, resourcing and other key functions?

4. Check the adequacy of external training support and report inconsistencies to the chain of command?

5. Maintain awareness of safety issues and make on-the-spot corrections?

The following questions apply to NCOs at every echelon (select several at each echelon IOT determine if the programs in place are used throughout the command or if there are any systemic problems at certain levels):

1. How do you influence or plan training for individual Soldiers, crews, and small teams?

2. What do you use to make sure you are conducting standards-based, performance-oriented training?
   a. Do you use Training and Evaluation Outlines (T&EOs)?
   b. Do you or the commander/platoon leader establish training objectives for the events you control?

3. Who identifies individual, small unit collective tasks and drills that support the unit KCTs?

4. Explain how individual Soldier task training relates to the collective tasks the unit trains, and how these relate to the unit’s KCTs?

5. How are you involved in planning, preparing, rehearsing, and executing
training, conducting AARs, and providing bottom-up feedback?

6. How do you maintain awareness of ongoing safety risk management that supports individual, crew, and small team training?

The above questions should provide the inspector an informed perspective of commander and leader understanding of their roles and responsibilities throughout the unit. Further questions can be added to explore any systemic problems and/or develop recommendations to fix any issues found.

B. Planning Training

Instructions to inspectors:

Review the OPORDs or FRAGOs for the last several training events.

Compare the training objectives for the training events to the training objectives identified in the UTP concept of operations. (The inspector is determining if the unit uses the operations process to develop their UTP, if the resulting plan nests with higher and is being adjusted to either increase the difficulty as skills are mastered and/or being adjusted to overcome any training short falls. If not, why?):

The following questions are for the Commanders and/or S3s at each echelon:

1. What planning method did you use to develop your UTP?

2. Do you use a different method to plan your training events?

3. Who is involved in planning and how do you conduct your planning sessions?

4. Are you making any adjustments to your UTP or training events? How, when and where are you making these adjustments?

5. How do you manage the planning and preparation for your training events?

Below are more detailed questions that can help the inspector to drill down (by echelon) and should be used as needed to determine root causes, solutions and where to recommend responsibility for fixes.

**Brigade-level** inspectors should review the current Unit Training Plan (UTP) OPORD.

1. Do the training objectives complement higher HQ’s training objectives for multiechelon events?
2. Do the training objectives reflect mastery of previously identified training objectives?

3. Do the event and UTP training objectives match?

4. Is an evaluation plan articulated?

5. Are prior evaluations available for planning?

6. How much “white space” (un-allocated training time) is allocated to subordinates?

**Brigade-level** inspection questions for any four of the following: BDE XO, BDE CSM, principal staff officers, staff NCOs, ABCS operators, and drivers.

1. When did you provide your input to the training plan?

2. Were you aware of the training objectives for the training events?

3. Are the training objectives building upon previously mastered skill sets?

4. Are you using previous assessments for event planning?

5. Where do you maintain your staff section assessments?

6. What are your procedures for processing and tracking training resource requests from the units?

**Battalion-level** inspectors should review Unit Training Plan (UTP) OPORD, the training calendar.

Review the OPORDs or FRAGOs for the last two training events.

Review the unit SOP for battalion-level training meetings. Identify the date and time for the last four training meetings.

1. Are the training meetings scheduled at least weekly?

2. Is there a set agenda for the training meetings?

3. Does the agenda allow for timely identification and procurement of resources?

4. Are the training meeting focused on training or are other issues addressed as well?
5. Are the results recorded?

**Battalion-level** inspection questions for any four of the following: BN XO, BN CSM, BN staff officers, BN staff NCOs, BN staff drivers.

1. When did you provide your input to the training plan?
2. Were you involved in the MDMP for developing the unit training plan?
3. Are the training objectives building upon previously mastered skill sets?
4. Are you using previous assessments for event planning?
5. Do the training meetings focus on training?
6. Do the training meetings allow for adequate planning?
7. Do you provide planning input during the training meeting?
8. What are your procedures for processing and tracking training resource requests from the units?
9. How much “white space” is allocated to subordinates?

**Company-level** inspectors should review the company Unit Training Plan (UTP), the last two weekly training schedules, and OPORDs or FRAGOs for the last two training events.

1. Are the training meetings scheduled at least weekly?
2. Is there a set agenda for the training meetings?
3. Does the agenda allow for timely identification and procurement of resources?
4. Are the training meetings focused on training or are other issues addressed as well?
5. Are the results recorded?

**Company-level** inspection questions for any four of the following: CO CDR, CO XO, CO 1SG, platoon leader, platoon sergeant, section leader, crew chief.

1. When did you provide your input to the training event?
2. Were you involved in the TLP for developing the unit training plan?

3. Are the training objectives building upon previously mastered skill sets?

4. Are you using previous assessments for event planning?

5. Do the company training meetings focus on only on training?

6. Do the company training meetings allow for adequate planning?

7. Do you provide planning input during the training meeting?

8. How much “white space” are provided to plan your training?

C. Preparing Training

The purpose of this portion of the evaluation is to determine the efficiency of the preparation activities of resourcing, rehearsing, and pre execution checks.

The following questions are for the commanders and/or S3s at each echelon:

1. What are your procedures for processing and tracking training resource requests?

2. Which resource requests are the most problematic?

3. What resources are managed at your echelon and how are they managed?

4. How do you begin your preparation for training events?

5. What parts of preparation receive emphasis?

6. When do plan your rehearsals?

7. How do you schedule your rehearsals?

8. Who evaluates your rehearsals?

9. How do your rehearsals help prepare for training?

10. What are your procedures for conducting pre-execution checks?

11. When do you plan for pre-combat checks?

**Brigade and Battalion-level** inspection questions for any four of the following: XO, CSM, staff section officer, staff section NCO.
1. How do you assist units in training preparation?

2. Where can you help units in training preparation?

**Battalion-level** inspectors should review the battalion training meeting agenda for specific training preparation topics.

1. Are leader, trainer, evaluator certification times discussed?

2. Are rehearsal times discussed?

3. Are pre-execution times discussed?

4. How do they track the progress of resource requests?

**Company-level** inspectors should review the last four weekly training schedules.

1. Are rehearsal times scheduled?

2. Are pre-execution inspection times scheduled?

**Company-level** inspection questions for any four of the following: CO CDR, CO XO, CO 1SG, platoon leader, platoon sergeant, section leader, crew chief.

1. Are pre execution checks standardized?

2. Who certifies the trainers?

3. What preparation assistance do you receive from battalion and brigade?

**D. Executing Training**

This portion of the inspection is focused on training execution. Successful training execution is the result of good preparation and planning. Adaptive leaders help training execution through responsive assistance, maximizing training opportunities, creative conditions, and accurate assessments.

**Brigade and Battalion-level** inspections for training execution need to focus on facilitating the training, and providing resources. Brigade and Battalion staffs need to ensure that they are simultaneously training their respective staffs and providing the necessary mission command functions for training execution.

**Brigade and Battalion-level** inspection questions for any four of the following: XO, CSM, staff section officer, staff section NCO.
1. What are your roles during subordinate unit training execution?

2. How would you evaluate your ability to assist training execution?

3. What are examples of your assistance to subordinate unit training execution?

**Company-level** inspection questions for any four of the following: CDR, XO, 1SG, Platoon leader, platoon sergeant, section leader, crew chief.

1. How do you make training challenging?

2. How do you plan to capture and record training data during execution?

3. How do you plan for retraining? During, after or as separate events?

4. Do you always achieve your training objectives during allotted time for your training events, if not, what do you do in response?

5. How do you allot enough subordinate training time prior to collective and multi-echelon events?

6. How do you make sure adequate training areas are scheduled/used to train your unit?

7. What do you use to ensure that training is done to standard for the tasks to be trained?

8. Are you able to routinely get adequate resources for your unit training? What do you do when there are problems or shortfalls?

9. How do you ensure your leaders are present at the right place and time for training?

10. How do you ensure the unit executes training safely? How do you make sure safety precautions do not limit training realism, or reduce the impact?

11. How do you train the opposing force properly, make sure they execute as a training aid for the unit and pose an adequate challenging threat?

12. How do you train, certify and position Observer-controller/trainers to observe, control and train the unit as necessary?

13. How do you integrate Army Mission Command Systems (AMCS) into your exercises?
E. Assessing Training

This portion of the inspection will focus upon the assessment of training. Assessment occurs throughout the training management process.

**Brigade and Battalion-level** inspections will focus upon the assessment of their respective staff sections and assessment of their roles in subordinate unit training. Inspector can review recorded assessments to assess their thoroughness.

**Brigade and Battalion-level** staff inspection questions for any four of the following: XO, CSM, staff section officer, staff section NCO.

1. How and when do you plan for your assessment of your staff sections, section leaders, and individuals?

2. How do you record your assessments?

3. How are AARs used to improve task proficiency and training quality?

**Battalion-level** inspections questions for any four of the following: XO, CSM, staff section leaders, staff section NCO.

1. How do you train, certify, rehearse and otherwise prepare the observers?

2. How does the commander assess the unit METL and determine KCT proficiency and does the unit have procedures established to ensure MET assessments are recorded in the DTMS?

3. How do the training assessments address such areas as training support, force integration, logistics, and personnel availability? Are there procedures established that link training proficiency to resources and does the UTP get adjusted based on training proficiency measures?

4. How does the commander ensure observers are qualified and familiar with applicable training and evaluation outlines used to evaluate task execution? How does the commander review an observer’s subjective assessment on the unit’s ability to perform a task?

5. When an AAR identifies a unit training strength to be sustained or a weaknesses that needs improvement, how does that information get routed back into the planning, training in the continuum of the operations process for training?

6. What criteria do leaders use to select appropriate times during a training event to conduct an AAR with the objective of improving future performance?
7. Are immediate in-stride corrections allowed?

8. How does the commander use ARFORGEN Aim Points to guide KCT proficiency training?

9. How does the commander ensure observers are qualified and familiar with applicable training and evaluation outlines used to evaluate task execution?

10. When an AAR identifies a unit training strength to be sustained or a training weakness that needs improvement, how does that information get routed back into the planning, training in the continuum of the operations process for training?

11. What criteria do leaders use to select appropriate times during a training event to conduct an AAR with the objective of improving future performance? Are immediate in-stride corrections allowed?

12. How are AAR used to improve task proficiency and training quality.

13. Are AARs conducted as part of an open learning environment where facilitators, participants, and observers freely discuss successes and honest mistakes?

14. How do you share your lessons learned with other units?
Appendix D

After-Action Review (AAR)

(available also on ATN as The Leader’s Guide to After-Action Reviews (AAR))

Purpose

D-1. AARs are “a guided analysis of an organization’s performance, conducted at appropriate times during and at the conclusion of a training event or operation with the objective of improving future performance. It includes a facilitator, event participants, and other observers (ADRP 7-0). The AAR provides valuable feedback essential to correcting training deficiencies. Feedback must be direct, on-the-spot and standards-based.

D-2. AARs are a professional discussion of a training event that enables Soldiers/units to discover for themselves what happened and develop a strategy for improving performance. They provide candid insights into strengths and weaknesses from various perspectives and feedback, and focus directly on the commander’s intent, training objectives and standards. Leaders know and enforce standards for collective and individual tasks. Task standards are performance measures found in the respective training and evaluation outlines (T&EO) found on the Army Training Network (ATN), the Digital Training Management System (DTMS) and the Combined Arms Training Strategies (CATS) – all available on ATN.

D-3. Leaders avoid creating the environment of a critique during AARs. Because Soldiers and leaders participating in an AAR actively self-discover what happened and why, they learn and remember more than they would from a critique alone. A critique only gives one viewpoint and frequently provides little opportunity for discussion of events by participants. The climate of the critique, focusing only on what is wrong, prevents candid and open discussion of training events and stifles learning and team building.

D-4. Leaders make on-the-spot corrections and take responsibility for training Soldiers and units. This occurs when leaders understand the commander’s intent, the tasks to be trained and exercise the principles of mission command to improve Soldier, leader, and unit performance. Units that conduct AARs and empower subordinates to make on-the-spot corrections are more effective.

D-5. Effective AARs are a reflection of the commander and his active role in unit training. AARs foster an environment of trust, collaboration, initiative, and cohesion necessary among Soldiers and leaders in decentralized operations. Soldiers learn and understand the commander’s intent and act decisively while accepting prudent risks.

D-6. AARs conducted during training include the same four parts as AARs conducted during operations:

- Review what was supposed to occur. The facilitator, along with the participants, reviews what was supposed to happen. This review is based on the commander’s intent, training objectives and tasks to train. This
information is usually found in the operations order or on the training schedule.

- **Establish what happened.** The facilitator and participants determine what actually occurred during the training event, phase or the operation. The leader attempts to gather as many views or perspectives (OPFOR, squad leader, team leader, rifleman, etc) as feasible and possible. This helps to establish a common understanding of the operation/event. Leaders then understand the complexity of an event and work to solve complex, ill-defined problems quickly.

- **Determine what was right or wrong with what happened.** Participants then establish the strong and weak points of their performance based on the commander’s intent and performance measures. The facilitator guides discussions to ensure maximum input that is operationally sound and relevant to the training event.

- **Determine how the task should be done differently next time.** The facilitator guides the unit in self-determining how the task(s) might be performed more effectively in the future. The unit identifies problems and provides solutions as well as identifies who is responsible for making the recommended changes. Additionally, the facilitator guides the discussion to determine if there is a more effective way to train the tasks to achieve the commander’s intent.

**Types of AARs**

D-7. There are two types of AARs, formal and informal. A formal AAR is resource-intensive and involves the planning, coordination, and preparation of the AAR site, supporting training aids, and support personnel. Informal AARs require less preparation and planning.

**Formal**

D-8. Leaders plan formal AARs at the same time they finalize their training plan (six to eight weeks before execution). Formal AARs require more planning and preparation than informal AARs. They require site reconnaissance and selection, coordination for training aids (terrain models, map blow-ups, etc), and selection, set up, and maintenance of the AAR site.

D-9. During formal AARs, the AAR facilitator (unit leader or observer-controller/trainer (OCT)) identifies and facilitates a discussion of specific event(s) based on training objectives, performance measures and the commander’s intent. The facilitator provides an overview of the event(s) plan (what was supposed to happen) and facilitates a discussion of actually what happened during execution, the identification of strengths, weaknesses and issues.
Participants are then able to identify what retraining needs to be conducted, and how to conduct the tasks differently to achieve the desired outcomes. At the end of the AAR, the facilitator reviews key points and issues, and summarizes observed strengths and weaknesses and the plan to train tasks differently to meet the commander’s intent.

**Informal**

D-10. Leaders and OCTs use informal AARs in much the same way as the formal AAR. Leaders conduct the informal AAR after previously identified events or as on-the-spot coaching tools while reviewing Soldier and unit performance during training. Both AARs involve all Soldiers and focus on what was planned, what happened, what worked and a determination of how to improve performance and increase complexity within the commander’s intent.

D-11. The most significant difference between the formal and informal AAR is that informal AARs require fewer training aids. Informal AARs provide immediate feedback to Soldiers, leaders, and units during training. Ideas and solutions gathered during informal AARs can be put to use as the unit continues its training. Due to time constraints and other limitations, conducting informal AARs at appropriate times as the training event progresses allows for on-the-spot corrections that improve performance now, while improving the overall performance of the unit as it progresses toward to conclusion of the training event, or scenario.

D-12. For example, after destroying an enemy observation post (OP) during a movement to contact, the squad leader conducts an informal AAR to make corrections and reinforce strengths. Using nothing more than pinecones to represent squad members, the squad leader and squad members discuss the contact from start to finish. The squad quickly:

- Identifies what was supposed to happen
- Establishes what happened from all levels
- Evaluates performance against the Army standard (as stated in the task’s T&EO)
- Identifies strengths and weaknesses
- Identifies opportunities to improve performance within the commanders intent when training continues
Summary of the types of AARs

<table>
<thead>
<tr>
<th>Formal AAR</th>
<th>Informal AAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conducted by either internal or external leaders and external observer-controllers (OC)</td>
<td>Conducted by internal chain of command</td>
</tr>
<tr>
<td>Takes more time to prepare</td>
<td>Takes less time to prepare</td>
</tr>
<tr>
<td>Uses complex training aids</td>
<td>Uses simple training aids</td>
</tr>
<tr>
<td>Scheduled - events and/or tasks are identified beforehand</td>
<td>Conducted as needed. Primarily based on leader assessment</td>
</tr>
<tr>
<td>Conducted where best supported</td>
<td>Held at the training site</td>
</tr>
</tbody>
</table>

Figure D-1. Summary of formal and informal AARs

AAR Fundamentals:

- Conducted during or immediately after each event
- Focused on commander’s intent, training objectives and standards
- Focus is on Soldier, leader, and unit performance
- Involves all participants in the discussion
- Uses open-ended questions
- Encourages initiative and innovation in finding more effective ways to achieve standards and meet training objectives and commanders intent
- Determines strengths and weaknesses
- Links performance to subsequent training

AAR Format:

- Review what was supposed to happen:
  - State the training objectives and tasks to train
  - Review OPFOR (if used) mission and purpose
- Review unit leader mission, intent and concept of operations

- Review what happened for a particular event (all levels). A technique is to approach chronologically, eg:
  - Review actions before first detection
  - Review report of first detection or contact
  - Review reaction to detection or contact
  - Review any FRAGO’s if used
  - Review events during engagement

- Review what went right and wrong (all levels):
  - Review extent to which unit met training objectives
  - Review extent that the commander’s intent was met
  - Have participants summarize the major learning points
  - Identify training deficiencies
  - Identify unit’s ability to perform task and meet commander’s intent
  - Identify safety risks and measures employed to mitigate the risks

- Determine how the event or task should be done next time
  - Identify if retraining should occur
  - Identify the conditions to modify
  - Identify which tasks to retrain to meet the commander’s intent
  - Identify a more effective way to meet the commander’s intent

AAR Planning and Execution

D-13. To maximize the effectiveness of AARs, formal or informal, leaders must plan and prepare to execute AARs. AAR planning is part of each training event. All leaders must understand the unit’s mission and the commander’s intent for the operation (event). During
planning, commanders identify opportunities to conduct AARs and assign observer-controller/trainer (OCT) responsibilities, and ensure the allocation of time and resources to conduct AARs. As training is conducted, subordinate leaders assess unit and leader proficiency on collective and individual tasks and conduct on-the-spot coaching/informal AARs. This requires that leaders understand the commander’s intent, concept of operations and task(s) to be trained during an event.

D-14. The amount and level of detail needed during the planning and preparation process depends on the type of AAR to be conducted and available resources. The AAR process has four steps:

   Step 1. Planning
   Step 2. Preparing
   Step 3. Conducting
   Step 4. Follow-up

**Step 1: Planning the AAR**

D-15. Commanders are responsible for training their units. They hold subordinate leaders responsible for training their respective organizations. Commanders instill *mission command* by using orders for events to enable disciplined initiative within the commander’s intent to empower agile and adaptive leaders. The AAR helps Soldiers develop a mutual understanding of the unit’s strengths and weaknesses. Commanders issue guidance and specify their intent for an upcoming event’s AAR.

D-16. The AAR plan provides the foundation for successful AARs. Commanders provide their intent and guidance to develop an AAR plan for each training event. Subordinates then determine how to achieve the commander’s intent. The guidance applies for formal and informal AARs and should contain:

- Which tasks are trained and are the focus of the AAR?
- In which events/phases of the operation are AARs conducted?
- Who observes the training and who conducts the AAR?
- Who attends?
- When and where does the AAR occur?
- What training aids are required?
D-17. Leaders or observer-controller/trainers (OCTs) use the AAR plan to identify critical places and events they must observe to provide the unit a timely and valid assessment; examples include unit maintenance collection points, passage points, and unit aid stations. The AAR plan also includes who (either internal or external to the unit) facilitates the AAR for a particular event. The leader or OCT is the individual tasked to observe training, provide control for the training, and lead the AAR.

**Selecting and Training Observer-Controller/Trainers (OCT)**

D-18. When planning an AAR, commanders select leaders/OCTs who:

- Demonstrate proficiency in the tasks to be trained
- Are knowledgeable of the duties they are to observe
- Are knowledgeable of current doctrine and TTPs

D-19. When using external OCTs, commanders strive to have OCTs that are at least equal in rank to the leader of the unit they will assess. If commanders must choose between experience and an understanding of current TTPs or rank, they should go with experience. A staff sergeant with experience as a tank platoon sergeant is a better platoon OCT than a sergeant first class who has no platoon sergeant experience.

D-20. Commanders are responsible for training and certifying OCTs to include providing training on how to conduct an AAR. Ideally, inexperienced OCTs should observe properly conducted AARs beforehand.

**Reviewing the Training & Evaluation Outline (T&EO)**

D-21. T&EOs are the source for understanding performance measures and step for all individual, and collective tasks. Additionally, T&EOs state the Army performance standards for these tasks (T&EOs can be accessed through the Army Training Network (ATN) at [https://atn.army.mil](https://atn.army.mil)). They can also be accesses via the Digital Training Management System (DTMS) and the Combined Arms Training Strategies (CATS), both available through ATN. The commander must specify the intent for the event along with the objectives and tasks to be trained. The commander also states the operational environment that is to be replicated during the event and the focus of the tasks trained. The leaders review the T&EO which provides the conditions, and standards for the respective collective or individual tasks. Leaders use the T&EOs to measure unit and Soldier performance.

D-22. Leaders and OCTs must review the tasks to be trained as specified in the commander’s guidance and intent for an upcoming event. The respective T&EOs are not only provided to remaining OCT team members, but also to the Soldiers in the unit. The T&EO states the performance measures and the order specifies the commander’s intent. All members of the
unit must review these documents to gain a complete and mutual understanding of the critical places and phases to assess task performance.

**Schedule Stopping Points**

D-23. Commanders schedule the time and place to conduct AARs as an integral part of training events. Commanders plan for AARs during and at the end of each critical phase or major training event. For example, a leader may plan a stopping point after issuing an OPORD, when the unit arrives at a new position, after consolidation on an objective, etc.

D-24. Commanders plan to allow approximately 30-45 minutes for platoon-level AARs, 1 hour for company-level AARs, and about 2 hours for battalion-level and above, but training to standard takes priority over training to time. Soldiers receive better feedback on their performance and remember the lessons longer as result of a quality AAR.

**Determining Attendance**

D-25. The AAR plan specifies who attends each AAR. At each echelon, an AAR has a primary set of participants. At squad and platoon levels, everyone attends and participates. At company or higher levels, it may not be practical to have everyone attend because of continuing operations or training. In this case, unit and OPFOR commanders, unit leaders, and other key players may be the only participants. Leaders or OCTs may recommend additional participants based on specific observations.

**Choosing Training Aids**

D-26. Training aids add to AAR effectiveness. Training aids should directly support discussion of the training and promote learning. Local training support center (TSC) catalogs list training aids available. Home station TSC support and training aids are available within the Army Training Support System (TSS).

D-27. Dry-erase boards, video equipment, digital maps, terrain models, and enlarged maps are all worthwhile, under the right conditions. For example, if reconnaissance reveals there are no sites which provided a view of the exercise area, the AAR facilitator may want to use a terrain table, or digital map.

D-28. Terrain visibility, group size, suitability to task, and availability of electrical power are all things to consider when selecting training aids. The key is planning and coordination, but only use a training aid if it makes the AAR better.

**Reviewing the AAR Plan**

D-29. The AAR plan is only a guide. Commanders issue their intent, and subordinates determine how to achieve that intent. Commanders, leaders and OCTs should review the AAR plan regularly during training meetings to make sure it is on track and meets the units.
training needs. The plan may be adjusted as necessary, but changes take preparation and planning time away from subordinate leaders or OCTs. The purpose of the AAR plan is to allow OCTs and leaders as much time as possible to prepare for the AAR.

**Step 2: Preparing the AAR**

D-30. Preparation is the key to the effective execution of any plan. Preparing for an AAR begins before the training and continues until the actual event.

**Review Training Objectives, T&EO’s, Orders, and Doctrine**

D-31. Leaders and OCTs must review the commander’s intent, operations order, training objectives and T&EOs before training, and again immediately before the AAR. The commander’s intent and training objectives are the basis for observations and the focus of the AAR. Leaders and OCTs review current doctrine, technical information, and applicable unit SOPs to ensure they have the tools to properly observe unit and individual performance.

D-32. Leaders and OCTs read and understand all WARNOs (warning order), OPORDs (operations order) and FRAGOs (fragmentary order) the unit issues before and during training to understand what is supposed to happen. The detailed knowledge OCTs display as result of these reviews adds credibility to their assessments.

**Identify Important Training Events**

D-33. Based on the commander’s intent, leaders or OCTs identify which training events (KCT, or as identified by the commander) are critical, and make sure they are positioned in the right place at the right time to observe the unit’s actions. Examples of critical events include:

- Training events that demonstrate KCT proficiency
- Issue of OPORDs and FRAGOs
- Military Decisionmaking Process (MDMP) or Troop Leading Procedures (TLP)
- Contact with opposing forces
- Resupply and reconstitution operations
- Passage of lines
Observe the Training and Take Notes

D-34. AAR facilitators are either internal (participating in the training) leaders or external (eg, OCTs) to the organization. Both have the requirement to make and consolidate insights, observations, and lessons to facilitate the discussion of what happened. The OCT keeps accurate records of what they see and hear, and records events, actions, and observations by time sequence to prevent loss of valuable information and feedback. OCTs can use any recording system (notebook, mobile device, prepared forms, 3x5 cards, etc) as long as it is reliable, sufficiently detailed (identifying times, places, and names). They include the date-time group (DTG) of each observation so it can be easily integrated with observations of other OCTs. This provides a comprehensive and detailed overview of what happened. When the OCTs have more time, they review the notes and fill in any details not written down earlier.

D-35. At times, this may be challenging for leaders actively participating in the event and also facilitating the AAR. But this can be mitigated through professional discussions, feedback and involvement of all participants in the AAR to develop a clear understanding of the event. The observations of all participants during the event not only allow for an understanding of the execution of the task(s) but also the impact of the operational environment. This sharing of observations allows Soldiers and leaders to develop mutual trust through a common understanding of the unit’s strengths and weaknesses.

D-36. One of the most difficult OCT tasks is to determine when and where to observe training. The OCT does not always need to stay close to the unit leader. The best location is where the OC can observe the performance of critical tasks and the overall flow of unit actions. The position cannot be a training distracter; look and act like a member of the unit (using individual and vehicle camouflage, movement techniques, cover and concealment, etc). The OCT cannot compromise the unit’s location or intent by being obvious. They are professional, courteous, and as unobtrusive as possible at all times.

Selecting AAR Sites

D-37. AARs occur at or near the training exercise site. During formal AARs, leaders identify and inspect designated AAR sites and prepare a site diagram showing the placement of training aids and other equipment. Designated AAR sites also allow pre-positioning of training aids and rapid assembly of key personnel, minimizing wasted time.

D-38. During informal AARs, leaders also conduct the AAR at or near the training site. The primary difference is that the training aids are minimal and often found on the ground (rocks, twigs, etc). Based on the commander’s intent the leader makes a determination of the time and location of the AAR site.

D-39. The AAR site needs to allow Soldiers to see the terrain where the exercise or training took place. If this is not possible, the trainer finds a location that allows them to see the terrain where the most critical or significant actions occurred. Time and resources determine the type
and complexity of the terrain model or enlarged map or sketch and a copy of the unit’s graphics.

D-40. The leader or OCT makes Soldiers attending the AAR as comfortable as reasonably possible by removing helmets, providing shelter from the elements, having refreshments (coffee, water). This creates an environment where participants can focus on the AAR without distractions. Participants should not face into the sun, and key leaders should have seats up front. Vehicle parking and equipment security areas should be far enough away from the AAR site to prevent distractions.

Collect Observations

D-41. Leaders and senior OCTs need a complete picture of what happened during the training to conduct an effective AAR. The Army problem solving process can assist leaders and OCTs and helps establish the base logic for gathering information and observation.

D-42. During the informal AAR the leader or facilitator can rely upon the input from the unit during the AAR or gather observations from his subordinates and OPFOR (if applicable). The observations gathered assist the leader with gaining an understanding of the operation from subordinate leaders which will help drive the AAR.

D-43. During the formal AAR the senior OCT receives input from subordinates, and supporting and adjacent units provide the senior OCT a comprehensive review of the unit they observed and their impact on the higher unit’s mission. The senior OCT also receives input from OPFOR leaders, players, and OCTs. The OPFOR perspective is critical in identifying why a unit was or was not successful. During formal AARs, the OPFOR leader briefs his plan and intent to set the stage for a discussion of what happened and why.

Organize the AAR

D-44. OCTs gather all the observation information and organize notes in a chronological sequence in order to understand the flow of events. The leader or OCT selects and sequences key events or the operation in terms of their relevance to the commander’s intent, training objectives, tasks to train and identifying key discussion and/or teaching points.

D-45. The purpose of the discussion is for participants to discover strengths and weaknesses, propose solutions, and adopt a course of action to correct problems. Leaders and OCTs organize the AAR using one of three techniques:

- **Chronological Order of Events:** This technique is logical, structured, and easy to understand. It follows the flow of training from start to finish. By covering actions in the order they took place, Soldiers and leaders are better able to recall what happened.
- **Warfighting Functions (WfF):** This technique structures the AAR using the WfF. The focus is on each WfF and their associated systems (people, organizations, information, and processes) and linked to the commander’s intent and training objectives. Participants can identify strengths and weaknesses across all phases and recommend solutions. This technique is useful in training staff sections.

- **Key Events/Themes/Issues:** Key events discussion focuses on critical training events, which directly support training objectives. This technique is effective when time is limited.

### Rehearse

D-46. **Formal AARs.** After thorough preparation, the OCT reviews the AAR format and gets ready to conduct the AAR. The OCT then announces to unit leaders the AAR starting time and location. This allows enough time for the OCTs to prepare and rehearse at the AAR site while unit leaders account for personnel and equipment, perform actions which their unit SOP requires, and move to the AAR site.

D-47. **Informal AARs.** Often leaders have minimal time to prepare for AARs and as time permits they identify and prioritize key observations. They then mentally review the training event in light of the observations gathered personally and from subordinates, based on one of the three techniques discussed previously. This allows the leader to mentally step through the AAR.

### Step 3: Conducting the AAR

D-48. The training exercise has reached a stopping point, AAR preparation is complete, and key players are at the designated AAR site. The leader or OCT reviews the purpose and sequence of the AAR to ensure everyone understands why an AAR is conducted. It is now time to conduct the AAR.

### Introduction and Rules

D-49. The introduction should include the following:

- **Everyone must participate** if they have an insight, observation, or question which will help the unit identify and correct deficiencies or sustain strengths. The AAR is a dynamic, candid, professional discussion of training that focuses on unit performance measured against the task standards (T&EO).

- **The AAR is not a critique.** No one, regardless of rank, position, or strength of personality, has all of the information or answers. AARs maximize training benefits by allowing Soldiers to learn from each other.
• **The AAR does not evaluate success or failure.** There are always weaknesses to improve and strengths to sustain.

D-50. Soldier participation is directly related to the atmosphere created during the introduction and command climate. The AAR leader makes a concerted effort to draw in Soldiers who seem reluctant to participate. The following techniques can help the leader or OCT create an atmosphere conducive to maximum participation:

- Reinforce the fact that it is permissible to disagree respectfully.
- Focus on learning and encourage people to give honest opinions.
- Use open-ended and leading questions to guide the discussion of Soldier, leader, and unit performance.
- Enter the discussion only when necessary.

**AAR Agenda**

D-51. State the mission, intent and concept of the operation. The leader or OCT reviews the commander’s training objectives and restates the tasks being reviewed, including the conditions and standards for the tasks.

D-52. Using maps, operational graphics, terrain boards, sticks, rocks, etc., the commander/leader restates the mission, intent and concept of the operation. The leader or OCT may guide the discussion to ensure everyone understands the plan and the commander’s intent. Another technique is to have subordinate leaders restate the mission and discuss the commander’s intent and concept of operation.

D-53. In a formal AAR, the OPFOR commander explains his plan and actions. He uses the same training aids as the friendly force commander, so that participants can understand the relationship between both plans.

**Summarize Events (what actually happened)**

D-54. The leader facilitator guides the review using a logical sequence of events to describe and discuss what happened. The facilitator (leader or OCT) and participants determine to the extent possible what actually happened during the training event, phase or the operation. The leader gathers as many views or perspectives (OPFOR, squad leader, team leader, rifle man, etc.) as possible. This helps to establish a common understanding. Leaders then understand the complexity of an event and work to solve complex, ill defined problems.
D-55. A discussion of the unit’s risk assessment conducted prior to the event and how the Soldiers applied measures to mitigate the risks. This is critical in helping Soldiers understand risk, act decisively and accept prudent risk in the future.

D-56. The facilitator does not ask yes or no questions, but encourages participation and guides discussion by using open-ended, leading questions. An open-ended question allows the person answering to reply based on what was significant to the soldier. Open-ended questions are also much less likely to put Soldiers on the defensive; these questions are more effective in finding out what happened.

D-57. As the discussion expands and more Soldiers add their perspectives, a clearer picture of what really happened emerges. The leader or OCT does not tell the Soldiers or leaders what was good or bad. The leader or OCT ensures specific issues are revealed, both positive and negative. Skilful guidance of the discussion will ensure the AAR does not gloss over mistakes or unit weaknesses.

Identify what went right or wrong

D-58. The unit must discuss both success and failure in the context of the mission, objectives and performance measures. To sustain success, the unit needs to know what it is doing well. Also, concentrate on identifying what went wrong and not on the person responsible. If necessary, it is better to identify the duty position rather than the person, ie, “the platoon leader” versus “2LT Wilson”.

Determine how the task should be done differently

D-59. The facilitator (leader or OCT) helps the unit in determining how the task(s) might be performed more effectively in the future. The unit identifies the conditions to modify to increase complexity, challenges leaders and subordinates to identify opportunities to take prudent risk within the commander’s intent. Additionally, the facilitator guides the discussion to determine if there is a more effective way to train the tasks to achieve the commander’s intent.

Closing Comments (Summary)

D-60. During the summary, the facilitator reviews and summarizes key points identified during the discussion. The AAR ends on a constructive note and links conclusions to future training. The facilitator then leaves the immediate area to allow unit or subordinate leaders and Soldiers time to discuss the training in private.
Step 4: Follow-up

D-61. AARs are the link between task performance and execution to standard. They provide commanders a critical assessment tool to plan Soldier, leader, and unit training. Through the professional and candid discussion of events, Soldiers can compare their performance against the standard and identify specific ways to improve proficiency.

D-62. Leaders should not delay retraining. If the leader delays retraining, the Soldiers and unit must understand they did not perform the task to standard and that retraining will occur later.

D-63. The benefits of AARs come from applying results in developing future training. Leaders can use the information to assess performance and to plan future training to correct deficiencies and sustain task proficiency.

Retraining

D-64. A lack of resources may prevent retraining on some tasks during the same exercise. When this happens, leaders must reschedule the mission or training. Leaders must ensure that a lack of proficiency in supporting collective and individual tasks found during the AAR are also scheduled and retrained.

Revised Standing Operating Procedures

D-65. AARs may reveal problems with unit SOPs. If so, unit leaders must revise the SOP and ensure units implement the changes during future training.

Additional Supporting Resources (also see the UTM page on ATN)

PDF Leader’s Guide to AARs

Video How to Conduct an AAR
Appendix E

Company Training Meetings

(also available as the *The Leader's Guide to Company Training Meetings*)

Overview

E-1. Company training meetings are the key to keeping the UTP on course. They are *non-negotiable*, and provide the commander and leaders visibility of the current state of unit training readiness. Accordingly, they appear on the weekly training schedule. Training meetings facilitate the top-down/bottom-up flow of information. Training meetings are a mechanism commanders use to manage training events week-by-week and ensure the unit stays on course to attain training goals and collective task proficiency. Although this leader’s guide is focused at the company-level, training meetings held at battalion and brigade are no less important and are equally vital to ensuring unit training proficiency. Their focus is predominantly on resourcing and supporting company-level training.

E-2. Subordinates provide their assessments regarding the training proficiency needs of the unit and individual Soldiers. Training meetings are conducted by leaders to review past training, identify and plan necessary retraining, plan and prepare future training, and exchange timely training information between leaders.

E-3. Feedback is an important aspect of training meetings and is used to refine the UTP as it progresses. This feedback takes many forms, for example, personal observation, after-action reviews, and informal evaluations. The training meeting is a primary forum for the discussion of training assessments (unit, leader and task proficiency).

Purpose

E-4. Training meetings are not a forum for discussion of administrative operations and non-training related activities. Training is the sole topic. Training meetings have four goals:

- Review and re-confirm the training focus and training objectives for future events.

- Validate the tasks (collective and individual) to train for future training events focusing on the KCTs and the attainment of Training Objectives (TO). The commander modifies and updates the tasks to train to meet UTP requirements.

- Synchronize collective tasks being trained in support of the unit mission with upcoming training events, confirm training objectives, resource requirements and status of coordination.

- Ensure face-to-face cross-communication between leaders. Subordinate leaders provide assessments of proficiency after each training event. Additionally, they ensure tasks trained at platoon, squad and individual level
are executed and assessed to standard and support the tasks the company must train.

Managing the UTP

E-5. ADRP 7-0 and The Leader’s Guide to Unit Training Management (UTM) on the Army Training Network (ATN) provides detailed discussions on the planning process. Provided below is a brief overview of the role that training meetings play in managing the progression of the UTP:

![Diagram of UTP processes from execution to KCT proficiency]

Figure E-1. UTP processes from execution to KCT proficiency

E-6. Each training event is individually managed and coordinated to ensure the UTP is executed as designed. If the UTP needs to be modified based on the unit achieving (or not achieving) specific, published training objectives, commander’s guidance given during training meetings is the means that drives future training event planning, and ultimately, the UTP.

Successful Training Meetings

- Validate the tasks (collective and individual) to train for upcoming events, focusing on the KCTs
- Synchronize unit KCTs with training events – refer to the CATS Task Selections (TS)
- Delegate and confirm responsibilities critical to executing events
- Review and confirm resource requirements and status
- Ensure cross communication between leaders
- Refine the training focus ((KCT) and training objectives) for upcoming events
Participants

E-7. Leader participation is essential for a successful company training meeting. The commander determines the participants to attend. The following is a suggested list of participants and responsibilities of those attending company training meetings.

Company Commander

E-8. The commander runs the meeting and is responsible for the efficient conduct of the training meeting. Prior to the meeting the commander updates his running estimate of the company’s proficiency to meet UTP training objectives. The commander reviews the assessment of the collective tasks to train, training calendar, upcoming training schedules and upcoming training event OPORDS. The commander then provides guidance for upcoming events and adjusts future events’ training focus based on this assessment, and confirms the status of resource requests/requirements. The commander updates the running estimate (collective task assessment, training risk status of external resources, status of trainers, etc.) and specifies the individual Soldier tasks for hip-pocket (opportunity) training with the advice of the 1SG.

Executive Officer (XO)

E-9. The XO runs the training meeting in the commander’s absence and coordinates training for all the Soldiers in sections or attachments without platoon leaders or platoon sergeants. The XO reviews the current assessment for KCTs, warrior tasks and battle drills and key individual tasks. The XO provides the status of resources to support upcoming events and identifies resource issues impacting on upcoming training. Additionally, the XO identifies and consolidates new resource requirements based on an adjustment of tasks-to-train for upcoming events.

First Sergeant (1SG)

E-10. The 1SG is the senior enlisted advisor to the commander on all issues that affect not only individual training in the unit but also collective tasks. The 1SG provides an assessment of individual and collective tasks and key warrior tasks and battle drills that support the company’s collective tasks to train. The 1SG provides guidance and advice on training plans, and reviews pre-execution checks discussed during the training meeting. Additionally, in the role of advisor, the 1SG helps in the leader development of officers and NCOs by actively participating in the formulation of effective training plans (tasks to train and identification of resource requirements) for platoons. He/she advises the commander on the selection of individual Soldier tasks for hip-pocket (opportunity) training.

Platoon Leaders

E-11. Brief their assessment of collective tasks and key leader tasks, warrior tasks and battle drill proficiency of their platoon, based on training conducted. They recommend adjusting tasks to train (training focus) for upcoming events based on their assessments. Additionally,
they either confirm previously submitted resource requirements for upcoming events or they identify new resource requests based on a change to the training focus for an upcoming event.

**Platoon Sergeants**

E-12. Provide their assessment of section/crew-level and individual tasks based on training conducted. Observes and receives feedback from squad leaders on the status of individual training conducted and ensures they support the company’s collective tasks. The platoon sergeant briefs the status of specific essential pre-execution checks (status of trainer(s)), resources, tasks to train or site recon) for upcoming events. Additionally, platoon sergeants provide input to any changes (collective tasks, warrior tasks or battle drills to train and resource requirements) to upcoming events.

**Key staff NCOs**

E-13. Master gunners and other key staff NCOs attend training meetings and advise the commander on the status of specialized training. As example, the master gunner works with the 1SG to track individual and crew-served weapon qualification, and helps leaders with gunnery training assessments. Identifies and advises leaders on opportunities to integrate specialized training into upcoming events. Additionally, advises leaders on specialized resource requirements for upcoming events.

**Maintenance team chiefs**

E-14. Coordinate the maintenance efforts of the company and work with the commander and XO to ensure timely support is provided. The maintenance team chief provides input on the status of maintenance training in the company, recommends maintenance related training, and informs the commander of scheduled services and inspections that will impact training. The maintenance team chief identifies any issues that will impact on upcoming events. Additionally, advises the commander on maintenance training requirements based on an assessment of training previously conducted.

**Supply Sergeants**

E-15. Provide input to the commander on supply-related issues, inspections, and inventories. Supply sergeants also work with the XO and 1SG to coordinate necessary support from outside sources.

**Attached and other support leaders**

E-16. They attend training meetings to coordinate their training efforts with those of the company. An example would be a fires battery with an attached target acquisition radar section. These leaders provide their assessment of tasks and battle drills previously trained. They confirm the tasks to train and the status of resource requirements for upcoming events. Commanders must fully integrate and support the training of all habitually associated units. RC companies may have associated AC personnel attend the training meetings. These personnel bring valuable experience and the latest training techniques from AC units.
Training Meeting Time and Place

E-17. Company training meetings should follow the battalion training meeting by not later than two days. They are generally conducted on the same day and time each week – this provides a degree of battle rhythm, consistency and predictability.

E-18. Selection of a time to conduct training meetings depends on several factors. Main considerations include:

- Enabling leaders to attend
- Minimizing training disruptions
- Allowing subordinate leaders time to prepare
- Local policy

E-19. Selecting a time for RC companies to conduct training meetings is more challenging. There are three alternatives:

- Conduct the meeting during a regularly scheduled drill period
- Conduct the meeting during an Additional Training Assembly (ATA)
- Conduct the training meeting during a “for points only” or non-paid assembly

Training Meeting Agenda

E-20. The agenda is keyed to the T-Week concept (see UTM chapter 4). There are three phases to company training meetings. The first is to assess previous training (T+1) the second to coordinate upcoming events (T-5 thru T-1), and finally to plan for future training events’ (T-6 & T-7) training. The agenda maintains a focus for all to see, understand, and follow. It should be posted prior to the meeting.

**Agenda Items**

Review Last Weeks Training:

- Platoon/subordinate element assessments: collective and individual tasks, warrior tasks and battle drill training (T+1)
- Identify training not conducted
- Update Company Assessment (KCTs/METs)
- Identify retraining required
• Identify DTMS database update requirements and responsibilities

**Coordination:**

• Review FRAGOs (new or updated command guidance)
• Pre-execution checks T-5 thru T-1
• Identify any changes to upcoming events (tasks to train)

**Future Planning:**

• Review BN/CO training calendar for adjustment as needed
• Provide CDR’s updated planning guidance for events (adjust training focus of events)
• Demonstrate how platoon tasks support the company KCTs (from the company UTP)
• Review draft training schedule for T-6 & T-7
• Review of Major T-Week Milestones for T-8 thru T-21, assign responsibility for the tasks, and receive updates
• Confirm/identify additional resource requirements

**Time Requirements**

E-21. Training meetings should not last more than an hour and a half if well organized. The intent is for the commander to achieve the meeting objectives as quickly and efficiently as possible.

**Recommended Time Line**

<table>
<thead>
<tr>
<th>Action</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review last week’s training</td>
<td>15 Minutes</td>
</tr>
<tr>
<td>Preparation for T-5 thru T-1 Training</td>
<td>30 Minutes</td>
</tr>
<tr>
<td>Future Planning (T-6 &amp; T-7)</td>
<td>15 Minutes</td>
</tr>
<tr>
<td>Review of Major Milestones (T-8 thru T-21)</td>
<td>10 Minutes</td>
</tr>
<tr>
<td>Identify any DTMS updates</td>
<td>5 minutes</td>
</tr>
</tbody>
</table>
Review Last Week’s Training

E-22. Commanders begin the meeting by discussing the training just completed. The bottom-up input by the platoon leaders and platoon sergeants is critical to assessment of the collective, leader, and individual training proficiency of the unit. The items listed below are agenda items that are discussed by company leaders. Assessments are also discussed in DTMS.

Platoon Assessment

- Collective, leader, Soldier tasks, warrior tasks and battle drills
- T-P-U assessments from T&EO (also Go/No-Go results from the performance steps, as necessary)

Training Shortfalls

- Training planned but not conducted (include discussion of tasks not trained)
- Reason for not executing
- Retraining plan, if needed

Company KCT/METL Update

- Platoon assessment of tasks that support company KCTs and other collective tasks trained last week
- Personal observations of training/task assessments (Cdr & 1SG)

E-23. Assessment of completed training may reveal training that is incomplete or not conducted to the Army standard. Retraining should be conducted at the first opportunity, ideally during the same training period. However, when this cannot happen, it may be necessary to adjust subsequent training events (adding or subtracting tasks to train) to retrain on those tasks that were not trained to standard. Adjustments are then made to the UTP for future events.

E-24. In reviewing retraining requirements, company leaders consider a number of factors:

- The number of Soldiers or elements involved
- If the retraining is sequential to other planned training. Does this need to be accomplished before completing a future task?
- Resource availability (ranges, instructors, logistics, etc)
- Original planning for the task, and modification as necessary
- When and where to reschedule the training at the first available opportunity
- When resources are available, retraining takes priority over training new tasks

**Platoon Assessments and Training Shortfalls**

E-25. Platoon leaders and platoon sergeants assess collective and Soldier proficiency since the last training meeting. This assessment is a T-P-U snapshot of all training conducted by the platoon. The sources of the platoon assessment may be formal or informal and based on the task T&EO. The leadership updates their assessments in the Digital Training Management System (DTMS).

E-26. As each platoon completes the training assessment, training shortfalls are addressed. A training shortfall is when training as planned was not conducted, or if training objectives were not met. Platoon leaders must explain to the commander the reasons for not executing training, and the plans to reschedule the missed training.

**Company KCT/METL Update**

E-27. The commander is responsible for training the unit. Once subordinates have provided their assessments, the command team (commander and 1SG) provide their input to training conducted and also identify any training shortfalls. This process is critical as it not only ensures a common understanding of the commander’s training end-state (based on the unit mission and guidance) for the unit but also develops subordinate leaders. Through this open dialogue commanders are holding their subordinate leaders responsible for training their respective organizations. This is a critical aspect of the process as it is imperative that leaders develop subordinates.

E-28. After all platoons complete their training assessments and discuss any training shortfalls, the commander with input from the 1SG, platoon leaders and XO, updates the company KCT/METL assessment.

**Coordination for Training (T-1 thru T-5)**

**Review FRAGOs (new or updated command guidance)**

E-29. During this step the unit reviews any new or updated guidance that will impact on training (T-1 thru T-5). The guidance could be either externally directed or based on the commander’s assessment of the unit. Commanders convey the purpose of the training and the desired end-state they expect, but they leave the “how” to achieve the results to subordinates. This instills the principles of mission command. Additionally, leaders understand and assess the impact on the current training plan. This impact is discussed and associated risks understood by the commander.

E-30. Leaders identify the events that will be modified/adjusted to incorporate the tasks previously identified during the assessment of last week’s training. Again leaders discuss the adjustments to the current training plan to clearly understand the command team’s end-state
for upcoming training. Once the training focus for the upcoming events is understood, the company leadership reviews key aspects of the pre-execution check list for these events.

**Pre-Execution Check Review**

E-31. These are procedures, usually using checklists, employed to ensure all planning and prerequisite training (soldier, leader, and collective) has been conducted prior to the execution of training. These are not pre-combat checks ([ADRP 7-0](#)). A critical part of the training meeting is the discussion of pre-execution checks. Pre-execution checks are developed by the chain of command and responsibility for their execution is fixed to ensure training is resourced and conducted properly. They become increasingly detailed as training schedules are developed. Pre-execution checks provide the attention to detailed needed to use time and other resources efficiently.

**Example Pre-Execution Checks**

Units should modify and refine this list based on their specific organization and mission.

- What are the lessons learned from the last time the training was conducted? Are they integrated in the next iteration?
- Is the OPFOR equipped and trained (if applicable)?
- Are “slice” elements integrated into planning and execution of training?
- Has a safety risk assessment been completed
- Do the trainers have the list of tasks to be trained?
- Have leaders identified pre-requisite tasks for the training event? Are Soldiers trained on prerequisite tasks prior to the event?
- Are leaders certified to conduct range operations?
- Are trainers identified and available for training?
- Do trainers have T&EOs for all tasks to be trained?
- Do trainers have a copy of the OPORD?
- Is rehearsal time programmed for trainers?
- Have training ranges, facilities and training areas been requested?
- Has a reconnaissance been conducted?
- Are range or maneuver books on hand?
- Are convoy clearances submitted and approved?
E-32. By reviewing pre-execution checks, the commander ensures training events are fully planned and coordinated with all elements of the company. The timeframe to look out depends on unit and organization SOPs. It is imperative the company understands the resource timeline requirements. The AC commanders look one to six weeks (or even further based on requesting timelines for resources) out when reviewing pre-execution checks. For RC commanders, the time period is the next three months. Within these training windows, commanders review pre-execution checks in reverse order. The last week (AC) or month (RC) first, working down until the next training period is covered in detail. The commander focuses on specific details when reviewing pre-execution checks. Pre-execution checks should be a part of the unit’s training SOP.

E-33. The primary trainer indicated on the training schedule briefs pre-execution checks. If the primary trainer is the platoon sergeant, then the platoon sergeant will brief the pre-execution checks during the training meeting. For almost every training event for platoon and below, the platoon sergeant is the key coordinator. The platoon sergeant coordinates the efforts of other NCOs in the platoon and ensures that training is thoroughly prepared.

**Planning for Future Training**

**Agenda Items**

- Review BN/CO UTP and training calendar for adjustments
- Provide CDR’s updated planning guidance for events (Training Objectives (TO))
- Demonstrate how platoon tasks support company KCTs
• Review draft training schedule for T-6 & T-7
• Confirm/Identify additional resource requirements
• Identify individual tasks for hip-pocket training

E-34. The company commander must check the battalion UTP. Events indicated on the battalion training calendar or found in the UTP are put on the company training schedule first. After these events are posted, the commander issues guidance (company tasks to train and end-state of training) for these future events. These tasks support the company’s KCTs from the UTP and the battalion’s training focus for the event. Additionally, this starts the planning process to support the company’s training focus/identified tasks, and develop pre-execution checks to fix responsibilities.

**Hip-Pocket (Opportunity) Training**

E-35. Hip-pocket training usually consists of individual tasks, selected by the commander that can be trained when the unit experiences inactive periods during scheduled training. It is also called “opportunity training” and is another technique for managing sustainment training. Tasks for this type of training are normally selected by the company commander so that when unexpected time becomes available during the unit’s daily activities, it can be used productively to train these tasks. Commanders can use training meetings to obtain input from subordinates on what training needs to be sustained. Hip-pocket training gives leaders confidence in their abilities to train and results in more efficient use of Soldiers’ time. Initial training or collective task training ordinarily requires more time and resources than will be available for short-notice, unscheduled training. Leaders should be able to train selected tasks within 15 to 30 minutes since more time may not be available.

**Platoon Leader/Platoon Sergeant Input**

E-36. Based on their training assessments, platoon leaders and platoon sergeants review current events identified in the company UTP and validate tasks to train to improve training proficiency. Additionally, resource requirements are discussed. These plans (adjusted training focus for future events) are briefed to the commander during the training meeting.

**Training Schedule Development**

E-37. Commanders receive input from all platoons and other elements of the company before formulating the draft training schedule. Because of support limitations or other conflicts, the commander may have to disapprove a training event that a platoon requested or move it to another week (AC) or month (RC). Once all conflicts are resolved, the commander develops a rough draft of the next training schedule in DTMS and then publishes it.
Additional Supporting Resources (also see the UTM page on ATN)

PDF  Leaders Guide to Training Meetings
Video  How to Conduct a Company Training Meeting
Video  How to Conduct a Battalion Level Training Meeting
Video  How to Conduct a Training Meeting (overview)
Appendix F

Training & Evaluation Outlines (T&EO)
(also available as the tutorial “Finding and Using T&EOs”)

Purpose

F-1. T&EOs are a document prepared for each collective and individual task that provides information on the task, training objectives, related individual training objectives, resource requirements, and applicable evaluation procedures. T&EOs are developed by each proponent responsible for the development of an individual or collective task. T&EOs are comprised of the following elements:

- **Task # and title**: A clearly defined and measurable task (collective or individual) accomplished by individuals and organizations. Tasks contribute to the accomplishment of missions or other requirements.

- **Proponent**: The branch or function responsible for the T&EO development.

- **Conditions**: The circumstances and environment under which a task is to be performed.

- **Standards**: The minimum acceptable proficiency required to perform the task under the specified conditions (the Army standard for successful completion of the task).

- **Safety Notes**: Identification of potential hazards while conducting training.

- **Environment**: Environmental risk assessment notes.

- **Performance Steps**: The steps required to conduct the task to the Army standard.

Any step within each T&EO that the training developer determines is a leader task (conducted by a leader or leaders) is identified by marking it with an asterisk (*). If the unit fails to correctly perform one of these identified steps to standard, it has failed to achieve the overall task standard. TRADOC Pamphlet 350-70-1

- **Performance Measures**: Standards of performance aligned with columns to annotate whether the task as demonstrated is rated a “Go” or “No Go” measured against the standard.

- **Supporting Collective, Individual and Leader Tasks**: Any additional tasks that support the primary task.

F-2. During training events T&EOs are used to refer to the Army standard in order to measure proficiency in the tasks being trained. Collective and individual tasks are evaluated by Go or
No-Go criteria by subordinate leaders and evaluators, and finally are assessed as either T - P - U by the commander. The performance measures are aggregated from section to squad to platoon and ultimately to the company commander and First Sergeant at the weekly training meeting. This is called “bottom-up feedback”. T&EOs are a primary source the company commander uses to evaluate the unit’s training readiness.

Conducting Evaluations using T&EOs

F-3. As performance measures are completed, the evaluator takes note of those measures that are correctly completed to standard (or not). This may also include observer notes as necessary. As the T&EOs are completed, these results tally the number of “Go” and “No-Go” performance steps and measures – the overall assessment of the task (T-P-U is determined by the evaluator and reported to the chain of command and unit commander.) The diagram below describes how to record task step performance and Commander’s Assessment:
Necessary to complete the T&EO are:

- **Tracking the number of iterations** of the task
- **Task Performance Summary** - aggregate of the Go/No-Gos
- **Training Status** – the overall assessment of the task

![Figure F-2. Aggregating performance iterations on a T&EO](image)

- The “M” is a record of performance during the MOPP Iteration
- The “T” column is where step totals are recorded and the commander records his overall assessment

F-4. Below is an example of a completed T&EO with the evaluations recorded and the Commander’s Assessment.

![Figure F-3. Tallying-up go/no-go performance for a ‘T’ assessment of the task](image)
Collective Task Numbering

F-5. Refer to appendix H for the details of how the task numbering system works. Leaders and training managers should pay particular attention to the echelon of the task to ensure they select the right level of task for their unit (e.g., company level task vice Division or Corps).

Where to find T&EOs

F-6. T&EOs are available through the Army Training Network (ATN), the Digital Training Management System (DTMS) and the Combined Arms Training Strategies (CATS). DTMS and CATS can be accessed via ATN. Users accessing T&EOs through ATN do not require additional privileges to view and print these.

Additional Supporting Resources (also see the UTM page on ATN)

Tutorial   Finding Tasks and Using T&EOs
Video      Training & Evaluation Outlines (T&EO)
Appendix G

Using CATS to Develop a Unit Training Plan (UTP)

Purpose

G-1. This appendix describes how to use the Combined Arms Training Strategies (CATS) to assist in the development of a Unit Training Plan (UTP). A more complete and detailed “how to” is available via CATS tutorials in the CATS Knowledge Base in ATN. As appropriate, links to those tutorials and supplemental information are provided in this appendix and throughout UTM.

Overview

G-2. In chapter 1, there were three major activities that commanders do to train their units to proficiency to meet mission requirements. These are: determine key tasks to train, develop a plan to train the unit and, plan and conduct training (plan-prepare-execute-assess). CATS can be used to conduct each of these activities using the enablers such as the CATS Planning Tool in DTMS (unit granted privileges required), or to a lesser extent, the CATS Viewer on ATN. Before demonstrating the relationship between UTM and CATS for each of these three major activities, it's important to understand the basics of the strategies.

G-3. CATS Fundamentals. The following are some basic concepts that should be understood prior to using CATS:

a. CATS are task-based, event-driven training strategies based on the missions, functions, and capabilities for which units are designed and provides:

- Task selections display a group of collective tasks that can be trained together. Task selections are normally named after a mission, function or capability the unit was designed to perform.

- Collective tasks link training and evaluation outlines (T&EOs) and are accessible in CATS. All collective tasks that form the strategy are drawn from the Unit Task List (UTL) (there are no CATS for units based on Table of Distribution and Allowances (TDA), though in some cases a UTP may be developed utilizing CATS from a similar TOE-based unit).

- Associated training events (FTX, Class, STX, STAFFEX, etc.) provide the progressive training methodology (crawl-walk-run) to train the task selections.

- CATS are synchronized with the Army's Force Generation (FORGEN) model and Standards in Training Commission (STRAC). CATS identify and justify acquisition and management of unit training resources that support current and future training and readiness requirements used by the Army.

- There are two type of CATS:
- Unit CATS, which are based on the unit’s Table of Organization and Equipment (TOE) and focus training on the unit’s mission, employment, core capabilities, and functions.

- Function CATS, which are used as a supplement strategy and are mission based, or function based and can be used to develop a training plan for “out of design” missions. Examples of Function CATS include: sustainment, counterinsurgency, peacekeeping, stability, mission command, amongst others (note: Unit CATS from other units can be applied as appropriate, e.g. A Civil Affairs Company CATS used for an artillery battery given a civil affairs mission).

- CATS provide the commander with “a way” to reach training proficiency. A commander can draw from the strategies and develop a customized training plan utilizing CATS and the UTM process. There are several filtering options provided by the CATS Planning Tool that can aid a commander or trainer in developing a training plan.

- Holistic CATS. This is the complete strategy. It provides all the task selections and associated collective tasks to train everything a unit was designed to do. This comprehensive strategy is based on approximately 120 days of collective training for active units and 39 days of collective training for reserve component units. Holistic CATS provide the complete “menu” of collective training options for the commander. Due to resource constraints it’s unlikely a commander would ever adopt the complete holistic strategy to develop a unit training plan.

- METL-Focused CATS. This strategy is composed of a reduced list of task selections that represents the unit’s core capability and highlights notional KCTs based on the proponent’s analysis. This strategy, much like the Holistic strategy is provided for reference only and represents only a TOE–based analysis (note: for readiness reporting purposes, these Task Selections usually represent good candidates to be battalion & company level Mission Essential Tasks (METs)).

- Unit METL-Focused CATS. This is the term (or filter) used in the CATS Planning Tool that represents a CATS solution based on the trainer’s completed mission analysis and KCTs that have been derived via mission analysis and higher-commander approved which can then be inputted into the CATS Planning Tool. The resulting UTP will most likely be a reflection of the Unit METL-Focused Strategy.

- CATS are developed at the company or lower echelon. For example, an Infantry battalion doesn’t have a battalion CATS per se; it has CATS for the Headquarters and Headquarters Company, the Rifle Company, and the Combat Support Company. Here is an example of all the CATS that can apply to an infantry battalion:
Figure G-1. Example Infantry battalion CATS

G-4. Using CATS to determine KCTs. CATS utilize a Unit Task List (UTL) to provide a foundation for the unit’s training strategy. Every collective task that the unit was designed to do is listed on the UTL. Therefore, when conducting a mission analysis the resulting determination of KCTs should be on the UTL, unless the unit has received an out-of-design mission. KCT candidates have been identified in the CATS planning tool by the proponent and are highlighted in blue. This precursory analysis is based on the TOE and represents collective tasks that are a core capability and support the unit’s higher unit’s METL. (Note: the Analysis that does the crosswalk from DA Standardized METL isn’t yet available in the CATS Planning Tool. What is displayed via METL focused Strategy and highlighted “blue” collective tasks are the results of that analysis). However, the METL-Focused Strategy should be used as a reference only as it only reflects the analysis that is based on the TOE and not on the mission that has been given to the commander. Utilizing the UTM process and conducting a mission analysis with the aid of the UTL can help in confirming the appropriate selection of KCTs from which a commander can use to provide focus to a unit training plan.

G-5. Develop a unit plan to train. The CATS Planning Tool provides a mechanism to input the results of mission analysis in the form of key collective tasks, task selections and events. The CATS Planning Tool will use these inputs to generate a graphical depiction of the unit training plan in the form a Unit Training Calendar composed of CATS Events. The tutorials in the CATS Knowledge Base provide several techniques for using the CATS Planning tool to generate these events for posting on the unit training calendar.

G-6. Plan and Conduct Training Events. CATS Events provide a great starting point for planning training events. Chapter 4 of UTM describes how CATS use events to provide the means to train collective tasks.

G-7. The following highlights the event information available in the CATS:

- **Task Selection**: Provides a grouping of collective tasks trained together in one or more events. A number of Task Selections constitute a training strategy for a particular unit (or mission, i.e. Function CATS).

- **Frequency**: Includes the recommended number of times the Task Selection should be trained during an ARFORGEN Cycle.

- **Event**: Provides a basis for assessing and evaluating unit readiness. They are designed to train Task Selections following a progressive (crawl-walk-run) methodology in order to build and sustain unit proficiency. Generally,
each Task Selection has more than one event identified. The commander may select one or more events to achieve the desired end-state.

- **Training Audience**: Describes all units, elements or individuals necessary to perform the Task Selection and ensure training can achieve the commander’s end-state and proficiency.

- **Training Aids Devices Simulators and Simulations (TADSS)**: TADSS identified within a training event assist the commander in mitigating limitations in maneuver space, density live fire ranges and training facilities at home station.

- **Multiechelon Training**: Identifies other Task Selections recommended to be performed by subordinate elements during this training.

- **Training Gates**: Identifies prerequisite training that should be conducted prior to training the Task Selection.

- **Purpose**: Describes why this particular event was selected to train this Task Selection.

- **Outcome**: Describes the end-state of training by the unit as a result of training the Task Selection in the specified event.

- **Execution Guidance**: Provides information for the commander to assist in determining the appropriate event to train a Task Selection and includes information to assist in the execution of training.

- **Resources**: Identifies approximate resource requirements to support the event for planning purposes. The commander may adjust the levels based on specific objectives and local training conditions.

Note: A tutorial on how to use the CATS event list is available in the CATS knowledge base and will show how to schedule CATS events and integrate them into a unit training calendar.

**Summary**

G-8. CATS provide “a way” to train and using proponent approved strategies. Enabled by the CATS Planning Tool in DTMS and following the UTM process, a commander can develop a customized plan to train for the given mission. For the complete “buttonology” and “step by step” of how to use this comprehensive enabler, please review the CATS tutorials that are available on the CATS knowledge base. Questions and recommendations regarding CATS can be submitted via the “Ask-A-Trainer” feature on ATN.

**Additional Supporting Resources (also see the UTM page on ATN)**

Link CATS Viewer on ATN
Appendix H

Task Numbering

Purpose

H-1. Understanding Army and Joint task numbering systems for the type tasks that apply to a specific unit is important. The correct identification of a task provides the right fidelity in applying these tasks to training plans and training events. This appendix describes the following task numbering conventions:

- Individual tasks
- Collective tasks
- Task Selections (TS)
- Army Tactical Tasks (ART)
- Universal Joint Tasks (UJT)

H-2. The following descriptions should assist in selecting the right tasks that apply to your unit. Note: institutional codes for individual tasks, proponent codes and echelon codes can be found at the end of this appendix.

Individual Tasks

H-3. Individual tasks are assigned numbers as follows:

- The first two numbers identify the proponent code
- The second set of numbers or letters are the MOS specific code, Common code (COM), or Shared MOS/CMF Code (000)
- The final four numbers are the designated sequence number to ensure the task is unique

071-11C-1001

Proponent Sequence Number

MOS Specific, Common (COM) or 000 (Shared between MOS or CMFs)

Includes: Individual Tasks, Leader Tasks, Staff Tasks, Warrior Tasks, and Battle Drills

Figure H-1. Individual task numbering convention
Collective Tasks

H-4. Collective Tasks are assigned numbers as follows:

- The first two numbers are proponent code
- The second number is the echelon
- The final four numbers are the designated sequence number to ensure the task is unique

![Figure H-2. Collective task numbering convention](image)

Task Selections (TS)

H-5. Task selections are collective tasks that are normally trained together. The Combined Arms Training Strategies (CATS) are based on TS. TS are assigned numbers as follows:

- The first two numbers are the proponent code
- The second two letters identify that it is a Task Selection (TS)
- The first of the last four numbers is the echelon code
- The last three numbers designated by the proponent to ensure the task selection is unique

![Figure H-3. CATS task Selection (TS) numbering convention](image)
Army Tactical Tasks (ART)

H-6. ARTs are assigned numbers as follows:

- The first number is the Warfighting Function
- The second number is a subdivided ART (section) of the Warfighting Function
- The third number (if provided) is a specified task within the section

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1.2.8
```

Figure H-4. Army Tactical Task (ART) numbering convention

Universal Joint Tasks (UJT)

H-7. UJTs are assigned numbers as follows:

- The first letters indicate the Level of War
- The first number is the major joint task
- The follow on numbers represent subdivided tasks within the major joint task

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OP 6.1.1
```

Figure H-5. Universal Joint Task (UJT) numbering convention
Institutional Codes for Individual Tasks

H-8. The following table provides information for determining the institutional proponent codes for individual tasks.

<table>
<thead>
<tr>
<th>Code</th>
<th>Training Proponent</th>
<th>Code</th>
<th>Training Proponent</th>
<th>Code</th>
<th>Training Proponent</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Aviation</td>
<td>157</td>
<td>Training Support</td>
<td>701L</td>
<td>Center of Army Profession</td>
</tr>
<tr>
<td>02</td>
<td>Combat Readiness</td>
<td>158</td>
<td>Deputy CoS for Intelligence</td>
<td>704</td>
<td>Army Management</td>
</tr>
<tr>
<td>05</td>
<td>Engineer</td>
<td>171</td>
<td>Deputy CoS for Resource Management</td>
<td>720</td>
<td>Security Cooperation</td>
</tr>
<tr>
<td>06</td>
<td>Field Artillery</td>
<td>181</td>
<td>Judge Advocate</td>
<td>805</td>
<td>7th Joint Military Training Center</td>
</tr>
<tr>
<td>07</td>
<td>Infantry</td>
<td>181</td>
<td>Military Police</td>
<td>805A</td>
<td>U.S. Army Training Center at Ft Jackson</td>
</tr>
<tr>
<td>08</td>
<td>Ranger Indoctrination</td>
<td>212</td>
<td>Defense Information</td>
<td>805B</td>
<td>Financial Management</td>
</tr>
<tr>
<td>09</td>
<td>Medical</td>
<td>213</td>
<td>Defense Language Institute</td>
<td>805C</td>
<td>Recruiting and Retention</td>
</tr>
<tr>
<td>10</td>
<td>Ordnance Center &amp; School</td>
<td>224</td>
<td>Foreign Language</td>
<td>805D</td>
<td>Chaplain</td>
</tr>
<tr>
<td>11</td>
<td>Ordnance Missile and Munitions</td>
<td>301</td>
<td>Intelligence</td>
<td>805E</td>
<td>Chaplain (USAF)</td>
</tr>
<tr>
<td>12</td>
<td>Quartermaster</td>
<td>301A</td>
<td>Unmanned Aircraft</td>
<td>805P</td>
<td>Chaplain (USN)</td>
</tr>
<tr>
<td>13</td>
<td>Signal</td>
<td>805P</td>
<td>Systems</td>
<td>805P</td>
<td>Physical Fitness</td>
</tr>
<tr>
<td>14</td>
<td>School and Cadet Command</td>
<td>31A</td>
<td>Special Warfare</td>
<td>805V</td>
<td>Victory University</td>
</tr>
<tr>
<td>15</td>
<td>Staff Training</td>
<td>411</td>
<td>Special OperationsAviation</td>
<td>807</td>
<td>Maneuver Support</td>
</tr>
<tr>
<td>16</td>
<td>Combined Arms</td>
<td>514</td>
<td>Sergeant Major</td>
<td>809</td>
<td>Maneuver Center of Excellence</td>
</tr>
<tr>
<td>17</td>
<td>Combined Arms Support</td>
<td>551</td>
<td>Music</td>
<td>819</td>
<td>Special Operations Aviation</td>
</tr>
<tr>
<td>18</td>
<td>Transportation</td>
<td>871</td>
<td>Aviation Medicine</td>
<td>871</td>
<td>Aviation Medicine</td>
</tr>
<tr>
<td>19</td>
<td>Aviation Logistics</td>
<td>592</td>
<td>Army Logistics</td>
<td>597</td>
<td>Army Logistics</td>
</tr>
<tr>
<td>20</td>
<td>NCO Academy/FT Jackson</td>
<td>604</td>
<td>NCOA/JAG</td>
<td>921</td>
<td>Army Reserve Readiness Command</td>
</tr>
<tr>
<td>21</td>
<td>Northern Warfare Training</td>
<td>699</td>
<td>Command and General Staff</td>
<td>921A</td>
<td>Army Reserve Readiness Center</td>
</tr>
<tr>
<td>22</td>
<td>TRADOC Command Historian</td>
<td>701</td>
<td>Command and General Staff</td>
<td>922</td>
<td>NGSEPC</td>
</tr>
<tr>
<td>23</td>
<td>FAATs</td>
<td>960</td>
<td>FAATs</td>
<td>960</td>
<td>Special Operations Aviation</td>
</tr>
<tr>
<td>24</td>
<td>NGE Retention and Recruiting</td>
<td>1038</td>
<td>NGE Retention and Recruiting</td>
<td>1038</td>
<td>NGERetention and Recruiting</td>
</tr>
</tbody>
</table>

Figure H-6. Institutional codes for individual Soldier tasks

Proponent Codes

H-9. The following table provides information for determining the proponent codes.

<table>
<thead>
<tr>
<th>Series No.</th>
<th>Title</th>
<th>Series No.</th>
<th>Title</th>
<th>Series No.</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Aviation</td>
<td>17</td>
<td>Armor</td>
<td>55</td>
<td>Transportation</td>
</tr>
<tr>
<td>03</td>
<td>CBRN</td>
<td>19</td>
<td>Military Police</td>
<td>63</td>
<td>Combat Service Support</td>
</tr>
<tr>
<td>05</td>
<td>Engineers</td>
<td>27</td>
<td>Judge Advocate</td>
<td>70</td>
<td>Research, Development and Acquisition</td>
</tr>
<tr>
<td>06</td>
<td>Field Artillery</td>
<td>30</td>
<td>Military Intelligence</td>
<td>70</td>
<td>Combined Arms</td>
</tr>
<tr>
<td>07</td>
<td>Infantry</td>
<td>31</td>
<td>Special Operations</td>
<td>71</td>
<td>Combined Arms</td>
</tr>
<tr>
<td>08</td>
<td>Medical</td>
<td>34</td>
<td>Combat Electronic Warfare and Intelligence</td>
<td>71</td>
<td>Combined Arms</td>
</tr>
<tr>
<td>09</td>
<td>Ordnance (Missile and Munitions)</td>
<td>40</td>
<td>Space and Missile Defense</td>
<td>71</td>
<td>Combined Arms</td>
</tr>
<tr>
<td>10</td>
<td>Quartermaster</td>
<td>41</td>
<td>Civil Affairs</td>
<td>71</td>
<td>Combined Arms</td>
</tr>
<tr>
<td>11</td>
<td>Signal</td>
<td>42</td>
<td>Supply</td>
<td>71</td>
<td>Combined Arms</td>
</tr>
<tr>
<td>12</td>
<td>Adjutant General</td>
<td>43</td>
<td>Maintenance (Except Missile)</td>
<td>71</td>
<td>Combined Arms</td>
</tr>
<tr>
<td>14</td>
<td>Finance</td>
<td>44</td>
<td>Air Defense Artillery</td>
<td>71</td>
<td>Combined Arms</td>
</tr>
<tr>
<td>16</td>
<td>Chaplain</td>
<td>45</td>
<td>Public Affairs</td>
<td>71</td>
<td>Combined Arms</td>
</tr>
</tbody>
</table>

Figure H-7. Proponent codes
Echelon Codes

H-10. The following table provides the echelon codes used in the collective task numbering system.

<table>
<thead>
<tr>
<th>Echelon Code</th>
<th>Unit Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Battalion (Squadron)</td>
</tr>
<tr>
<td>2</td>
<td>Company (Troop, Battery, Detachment)</td>
</tr>
<tr>
<td>3</td>
<td>Platoon</td>
</tr>
<tr>
<td>4</td>
<td>Squad/Section</td>
</tr>
<tr>
<td>5</td>
<td>Crew/Team</td>
</tr>
<tr>
<td>6</td>
<td>Brigade (Group, Regiment)</td>
</tr>
<tr>
<td>7</td>
<td>Division</td>
</tr>
<tr>
<td>8</td>
<td>Corps</td>
</tr>
<tr>
<td>9</td>
<td>Echelons Above Corps</td>
</tr>
</tbody>
</table>

Figure H-8. Echelon codes
Glossary

*after-action review (AAR)
a guided analysis of an organization’s performance, conducted at appropriate times during and at the conclusion of a training event or operation with the objective of improving future performance. It includes a facilitator, event participants, and other observers (ADRP 7-0).

Army doctrine publication (ADP) 7-0
the Army’s keystone manual that provides a brief, over-arching introduction to what is Army training. ADP 7-0 is approved by the CSA.

Army doctrine reference publication (ADRP) 7-0
the Army’s doctrinal training manual that provides the details of the fundamental training concepts introduced in ADP 7-0.

*aim point
within ARFORGEN, aim points provide the Army a means to track units at a prescribed state of readiness as they move through the ARFORGEN Force Pools and progressively increase readiness. Aim points allow Army leadership and force providers to make accurate, timely decisions, and to mitigate risk on manning, equipping, and sourcing in accordance with Army priorities (AR 525-29).

Army force generation (ARFORGEN)
is the structured progression of unit readiness over time to produce trained, ready, and cohesive units prepared for operational deployment in support of (ISO) the combatant commander (CCDR) and other Army requirements. The ARFORGEN process is the Army’s core process for force generation. (AR 525-20)

Army training network (ATN)
an official Army web site that delivers training doctrine (ADP 7-0/ADRP 7-0, how-to processes (Unit Training Management (UTM)), and training resources to all Soldiers. It is available at https://atn.army.mil.

Army universal task list (AUTL)
divides the warfighting functions into Army tactical tasks (ARTs). Almost any ART can be the “what” of a unit mission statement. Most ARTs can subdivide into subordinate ARTs which can be broken down until they are no longer tasks, missions, or capabilities. At that level, tasks, missions, and operations or capabilities become individual tasks addressed in Soldier training publications. ART definitions at a lower level elaborate on higher- level ART definitions (FM 7-15).

assessment
the leader’s judgment of the organization’s ability to perform its KCTs/METs and ultimately, its ability to accomplish its mission.
**battle drills**
groups of collective skills designed to teach a unit to react and accomplish the mission in common combat situations (STP 21-1-SMCT).

**blended training environment (BTE)**
a training event accomplished using mission command systems stimulated by inconsistent, non-persistent simulation/simulator systems.

**collective task**
clearly defined, observable, and measurable activities or actions that require organized team or unit performance, leading to the accomplishment of a mission or function. Collective task accomplishment requires the performance to standard of supporting individual or collective tasks. A collective task also describes the performance required of a unit under the conditions identified by the training developer to replicate the anticipated operating environment (TP 350-70-1).

**combined arms training strategies (CATS)**
provides task-based event-driven training strategies, designed to assist the unit commander in planning, and executing training events that enable the unit to build and sustain Soldier, leader, and unit proficiency in mission essential tasks. The CATS provide training events, frequency, and duration that a commander uses in developing unit training guidance, strategy, and calendars.

**commanders’ dialogue**
the process where at the end of mission analysis, the subordinate commander discusses the key collective tasks he has selected to train with the higher commander and the support necessary to achieve proficiency on those tasks. Approval of the key collective tasks begins the Course of Action (COA) development process (ADRP 7-0).

**commander’s visualization**
the mental process of developing situational understanding, determining the desired end-state, and envisioning an operational approach by which the force will achieve that end-state (ADRP 5-0).

**condition**
those variables of an operational environment or situation in which a unit, system, or individual is expected to operate and may affect performance (JP 1-02).

**constructive**
training uses computer models and simulations to exercise command and staff functions. It involves simulated people operating simulated systems. Constructive training can be conducted by units from platoon through echelons above corps.
**crawl-walk-run**
a progressive training regimen where units begin training simple, fundamental individual and collective tasks first, then gradually progresses to more complex, unit-level collective tasks *(ADRP 7-0)*.

**culminating training event (CTE)**
describes the final training exercise for a training period. The CTE is the event in which the unit demonstrates its ability to perform its assigned mission under conditions that replicate the OE in which it will operate.

**decisive action training environment (DATE)**
is the approved Army training environment for use when a unit is not training for an assigned mission. The DATE is a tool that describes the PMESII-PT operational variables for the training community to use across training events ranging from rotations at the Combat Training Centers (CTCs) to home station training (HST) events. Exercise planners should use this document for all exercise and scenario design requirements leading up to the culminating training event at the end of train-ready force pool.

**digital training management system (DTMS)**
is a web-based training management system. It assists units in training planning and management, and tracking unit training and Soldiers Individual Training Records (ITR) in accordance with AR 350-1, *Army Training and Leader Development*. It also assists with implementing the doctrine, tactics, techniques, and procedures outlined in ADRP 7-0, *Training Units and Developing Leaders and Unit Training Management (UTM)*.

**eight-step training model**
a popular, non-doctrinal planning and execution model used by many units as an easy-to-follow guide to manage unit training. Many units develop and use other, internally developed training models. See UTM for a more detailed discussion of the 8-step training model.

**essential task**
a specified or implied task that must be executed to accomplish the mission *(ATTP 5-0.1)*.

**evaluation**
the process used to measure the demonstrated ability of individuals and units to accomplish specified training objectives.

**fragmentary order (FRAGO)**
an abbreviated form of an operation order issued, as needed, after an operation order to change or modify that order or to execute a branch or sequel to that order *(JP 5-0)*.

**gaming**
is the use of technology employing commercial or government off-the-shelf, multi-genre games in a realistic, semi-immersive environment to support education and training. The military uses gaming technologies to create capabilities to help train individuals and
organizations. Gaming can enable individual, collective, and multiechelon training. Gaming can operate in a stand-alone environment or be integrated with live, virtual, or constructive enablers.

**green-amber-red cycle**
a time management technique set by higher headquarters so subordinate units know what level of taskings they will receive, or level of protection their training will receive, so that commanders can plan appropriate training. The cycles help the commander determine when they should plan multiechelon collective training (Green Cycle); individual, leader, crew and squad level (Amber); and self-development and individual Soldier skills such as Warrior tasks (Red Cycle.) This technique allows commanders to easily display and communicate training protection and training distracters on their training calendars. Often these cycles change on a quarterly basis, but commanders at all levels should check locally to ensure they fully understand how it is applied in their units.

**hip-pocket (opportunity) training**
usually consists of individual tasks, selected by the commander that can be trained when the unit experiences inactive periods during scheduled training. It is also called “opportunity training” and is another technique for managing sustainment training.

**HQDA standardized METL**
HQDA-approved and proponent developed brigade and higher METLs. Purpose is to standardize the capabilities of like-type units. These are only available on the Army Training Network (ATN) [https://atn.army.mil](https://atn.army.mil)

**implied task**
a task that must be performed to accomplish a specified task or mission but is not stated in the higher headquarters” order ([ATTP 5-0.1](https://www.army.mil)).

**individual task**
a clearly defined, observable, and measurable activity accomplished by an individual. It is the lowest behavioral level in a job or duty that is performed for its own sake. An individual task supports one or more collective tasks or drills and often supports another individual task ([TP 350-70-1](https://www.army.mil)).

**institutional training domain**
the Army’s institutional training and education system, which primarily includes training base centers and schools that provide initial training and subsequent professional military education for Soldiers, military leaders, and Army civilians ([ADP 7-0](https://www.army.mil)).

**integrated training environment (ITE)**
commanders leverage the capabilities offered by mission command training complexes and employ a persistent, consistent integrated training environment (ITE). Commanders use a combination of live, virtual, constructive and gaming training enablers to create a realistic training environment, optimize training time, and mitigate live resource shortfalls.
key collective task (KCT)
those essential tasks expressed as collective tasks that the unit must perform to the Army standard to achieve the desired training mission end-state. KCTs are derived through mission analysis, approved by the higher commander and provide the unit focus for attaining training proficiency.

leader task
an individual task performed by a leader that is integral to successful performance of a collective task. (TR 350-70)

live
training is training executed in field conditions using tactical equipment. It involves real people operating real systems. Live training may be enhanced by Training Aids, Devices, simulators, Simulations (TADSS) and tactical engagement simulation to simulate combat conditions.

*military decisionmaking process (MDMP)
an iterative planning methodology to understand the situation and mission, develop a course of action, and produce an operation plan or order. Normally used by units that have a coordinating staff (battalion and higher) (ADP 5-0).

*mission command
the exercise of authority and direction, by the commander, using mission orders to enable disciplined initiative within the commander’s intent to empower agile and adaptive leaders in the conduct of unified land operations. It is commander-led and blends the art of command and the science of control to integrate the warfighting functions to accomplish the mission (ADP 6-0 & ATTP 5-0.1).

*mission-essential task (MET)
a task a unit could perform based on its design, equipment, manning, and TOE/TDA mission (ADRP 7-0)

*mission-essential task list (METL)
a compilation of mission-essential tasks (ADRP 7-0).

mission statement
a short sentence or paragraph that describes the organization’s essential task (or tasks) and purpose—a clear statement of the action to be taken and the reason for doing so. The mission statement contains the elements of who, what, when, where, and why, but seldom specifies how (JP 5-0).

multiechelon training
a training technique that allows for the simultaneous training of more than one echelon on different or complementary tasks (ADRP 7-0).
**operational environment (OE)**
a composite of the conditions, circumstances, and influences that affect the employment of capabilities and bear on the decisions of the commander (TC 7-101).

**operational training domain**
the training activities organizations undertake while at home station, at maneuver combat training centers, during joint exercises, at mobilization centers, and while operationally deployed (ADRP 7-0).

**operations process**
the major mission command activities performed during operations: planning, preparing, executing, and continuously assessing the operation (ADP 5-0).

**operations order (OPORD)**
a directive issued by a commander to subordinate commanders for the purpose of effecting the coordinated execution of an operation (JP 5-0).

**planning horizon**
a point in time commanders use to focus the organization’s planning efforts to shape future events (ADRP 5-0).

**PMESII-PT**
a memory aid for the operational variables used to describe an operational environment: political, military, economic, social, information, infrastructure, physical environment, and time (TC 7-101).

**pre-combat checks (PCC)**
detailed final checks that all units conduct before and during execution of training and combat operations as part of the troop leading procedures. They are conducted at the beginning of each event or exercise. Although pre-combat checks start in garrison, some checks may be completed in the assembly area or in a battle position, for example; applying camouflage, setting radio frequencies, and distributing ammunition. Pre-combat checks apply to both operations and training – they should not be confused with pre-execution checks (see below).

**pre-execution checks**
procedures, usually using checklists, employed to ensure all planning and prerequisite training (soldier, leader, and collective) has been conducted prior to the execution or conduct of training. These are not pre-combat checks (ADRP 7-0).

**rehearsal**
an event in which one or more members of a unit practice, recite, recount, repeat, or drill a set of tasks or procedures to prepare for a formal performance. It is a training technique used to ensure team members understand what they and other members of the team must accomplish to perform a task successfully (ADRP 5-0).
**specified task**
a task specifically assigned to a unit by its higher headquarters (ATTP 5-0.1).

**self-development training domain**
planned, goal-oriented learning that reinforces and expands the depth and breadth of an individual’s knowledge base, self-awareness, and situational awareness; complements institutional and operational learning; enhances professional competence; and meets personal objectives (ADP 7-0).

**sergeant’s time training (STT)**
training time set aside by the commander that affords a prime opportunity for developing first line leaders while they gain confidence of their Soldiers. Commanders establish STT as a regular part of the units training program. This allows NCOs to train selected tasks to their Soldiers in a small group environment. STT tasks should crosswalk back to the unit’s KCTs (ADRP 7-0).

**standards**
a quantitative or qualitative measure and criterion for specifying the levels of performance of a task.

**T-P-U**
training assessment standards: **T** = unit or element meets training standards; **P** = unit or element requires more practice to meet task standards; **U** = unit or element does not meet standards for the task (ADRP 7-0).

**task**
a clearly defined and measurable activity accomplished by individuals and organizations.

**task group (TG)**
for HQDA Standardized METLS at brigade and higher, Task Groups (TG) are groupings of higher level collective tasks that define a MET.

**task selection (TS)**
a collection of collective tasks that would logically be trained together. The CATS are organized in task selections.

**t-week concept**
the weeks before and the week after the execution of a training event. For example, T-12 is twelve weeks from actual event execution. T+1 is the week following a training event. This framework helps the commander and other training managers manage resourcing and coordination for specific events that support the Unit Training Plan (UTP).
training and evaluation outline (T&EO)
a summary document that provides information on collective training objectives, related individual training objectives, resource requirements, and applicable evaluation procedures for a type of organization (ADRP 7-0).

training aids, devices, simulators and simulations (TADSS)
these enhance the training of Soldier, leader, crew and collective tasks. TADSS has four elements: training aids (VISMOD, GTA, models, displays, etc); training devices (MILES, practice mines, training grenades, etc); simulators (flight simulators, Conduct of Fire Trainer (COFT, etc); and simulations.

training briefing (TB)
as part of the unit training plan (UTP) development, this is the briefing where the unit commander presents the recommended training Course of Action (COA) to the higher commander. The briefing produces a “contract” between the two commanders that the subordinate commander executes as approved and the higher commander supports with the required resources to train. The frequency is determined by the commander and based on when it makes sense to conduct. If these are done on a quarterly basis, they are referred to as “QTB”. If executed yearly, as “YTB”.

training objective
a statement that describes the desired outcome of a training activity in the unit. A training objective consists of the task, conditions, and standard (ADRP 7-0).

troop leading procedures (TLP)
the Army’s operational and training process for the development of plans. Normally used by units that do not have a coordinating staff (company and platoon) (ATTP 5-0.1).

training supervision
a collaborative process that for a for a deploying ARFORGEN unit, the providing commander involves the gaining commander in the training process. The providing and gaining commanders share information, resources, and guidance to ensure the unit trains on the right tasks under the right conditions to accomplish the mission. This mutual involvement begins with the assignment of a mission to the unit and ends when the unit returns from deployment to enter the reset force pool of ARFORGEN (ADRP 7-0).

unit training plan (UTP)
a unit’s overarching training plan to achieve proficiency in the key collective tasks the commander has chosen to train. The UTP covers a specified “planning horizon” from ARFORGEN, or as designated by the unit commander.

unit training management (UTM)
the process commanders, leaders and staffs use to plan unit training and identify the resources needed to plan-prepare-execute-assess training.
universal joint task list (UJTL)
a library of universal joint tasks (UJTs), which serve as a foundation for capabilities-based planning across the range of military operations. A UJT is an action assigned to provide a capability. The UJTL supports the DOD in joint capabilities-based planning, joint force development, readiness reporting, experimentation, joint training and education, and lessons learned. It does not include conditions or standards; those are determined by the unit.

unit task list (UTL)
a list, based on a unit’s organization, personnel, and equipment. The UTL identifies a unit’s mission and capabilities from which the entire set of a unit’s collective tasks is derived. These collective tasks make up the UTL.

virtual training
is executed using computer-generated battlefields in simulators with the approximate characteristics of tactical weapon systems and vehicles. Virtual training is used to exercise motor control, decisionmaking, and communication skills. Sometimes called “human-in-the-loop training,” it involves real people operating simulated systems. People being trained practice the skills needed to operate actual equipment, for example, flying an aircraft.

warrior tasks
selected common individual Soldier skills deemed critical to a Soldier’s basic competency (STP 21-1-SMCT).

*warning order (WARNO)
a preliminary notice of an order or action that is to follow, sent immediately after the commander issues planning guidance. It is the last task upon receipt of a mission and provides subordinate and supporting units essential information to initiate the Military Decisionmaking Process (MDMP) or Troop Leading Procedures (TLP) (ATTP 5-0.1).

white space
referred to as “open space” in ADRP 7-0, it is that empty space on the higher units training calendar set aside for subordinate units to plan their own training events. Visually, this “white space” represents training time that subordinate units can use to plan and execute their own training activities and events.
(This page intentionally left blank)
References

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