



# PREPARING JOPGs FOR CRISIS RESPONSE PLANNING

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## VIRTUAL AND IN-PERSON

**R**UNNING A PLANNING TEAM is hard and requires experience, subject knowledge, confidence, and strong organizational and management skills. It also requires a patient leader who is able to work effectively with superior officers, peers, and subordinates. Most military officers have little experience working or planning at the operational level of war, however, most have participated in planning activities before, whether in a Joint Operations Planning Group (JOPG), operational planning group, or operational planning team. The leap between planning at the tactical level and the operational level can be challenging to most officers as the speed in which decisions are made, the joint ca-

pabilities required, and the clarity of guidance changes dramatically.

These deficiencies can be mitigated by education and experience, and the JOPG Leaders Workshop is one tool to increase the proficiency and effectiveness of an operational level staff in conducting military planning. Over the last ten months, the Joint Warfare Centre (JWC) has developed the JOPG Leaders Workshop curriculum and instructed four NATO military headquarters on how to improve the organizational management of their respective JOPGs.

The aim of this article is to raise awareness around the need for the JOPG Leaders Workshop, elaborate on what the training audience can expect during the event, why the JWC

is the right organization to facilitate workshop, and when headquarters should conduct it.

The workshop was designed specifically to address and resolve consistent tensions observed by the JWC during crisis response planning (CRP), as part of Phase 2B of the NATO Exercise Process. Observed trends for increasing effectiveness have included: the need to improve organizational management, developing a more holistic understanding of the NATO Operational Planning Process, building a better appreciation of the complexities involved in the operating environment, and closer integration and collaboration across the staff. Eclipsing all of these tensions is the lack of any NATO publications or courses to assist JOPG leaders with the organizational



and leadership challenges in running an operational planning group. The JWC assesses that if tangible improvements are not achieved during the CRP, commands will continue to underperform in their planning endeavours, and enter operating environments without the required understanding, foresight, and adaptability to effectively develop and execute planned operations, which are crucial for enabling the commander's decision-making cycle.

The JWC developed this workshop to offset these problems, to share best practices, and to develop a common appreciation of the JOPG's broad responsibilities amongst the leaders and staff officers that participate in planning activities throughout a headquarters. The workshop seeks to improve JOPG organizational management, increase proficiencies in operational-level planning, and improve understanding of the operational environment through scenario-based practical exercises.

The JWC aims to provide this workshop upon request to participating exercise training audiences as part of their collective training support package. While providing the workshop, the JWC will gain lessons learned and adjust the workshop to ensure it is fit for purpose, enabling different JOPGs to prepare for the challenges they face during the CRP phase. Through the support from NATO senior leaders and mentors, the JWC will formalize the recommended JOPG Leaders Workshop duration, curriculum, and audience participation; however, the workshop will remain tailorable to a training audience's needs.

To achieve workshop aims, the training event consists of discussion-based lectures, situational vignettes, and practical exercises. Throughout the workshop, a training audience can anticipate 30 per cent discussion-based lectures and 70 per cent practical exercises to reinforce workshop learning objectives and enable the organization to prepare for their upcoming CRP. The discussion-based lectures focus primarily on workshop pre-readings and audience members' past planning experiences.

Throughout the workshop, lessons learned, best practices, and tips are provided to the training audience to share what successful planning tactics, techniques, and procedures have worked in various NATO commands. Units will first learn about the JOPG Leaders Workshop at the various exercise planning conferences that are held throughout the NATO Exercise Process. During these conferences, the JWC staff officers will present the workshop as an option for the training audiences because it is not a formal step in the exercise process. With the workshop designed to fit the needs of the training audience, units have the flexibility to decide the duration and desired content of the training event. It is recommended that a training audience

conducts this workshop during the Academic Period of the NATO Exercise Planning Process, but at least prior to their CRP execution.

To increase a JOPG's organizational management and understanding of the operational environment, the curriculum centers around its organizational and administrative requirements, as well as planning-to-plan and battle rhythm development, while introducing Design Thinking — the application of critical thinking techniques to help solve complex problems. Without the development of a plan-to-plan and battle rhythm, the JWC routinely observes training audiences challenged with working out the necessary requirements to effectively plan during the first few days of the CRP.

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### DESIRED PARTICIPATION

- Strategic Plans and Policy Personnel
- J5/G5 Staff Officers
- JOPG Leadership
- JOPG Syndicate Leaders
- Operational Planning and Assessment Staff
- Joint Functional Experts

For more information about the JWC's JOPG Leaders Workshop, please contact [pao@jwc.nato.int](mailto:pao@jwc.nato.int)

**OPPOSITE:** (From left) Design Thinking workshop; scripting workshop for STEADFAST JUPITER-JACKAL 2020, the vignette workshop for STEADFAST DEFENDER 2021 during the exercise planning phase. **RIGHT:** Crisis response planning for STEADFAST JACKAL 2021. Photos by JWC PAO





**FROM LEFT:** In early 2020, the JWC initiated three main lines of effort to operationalize its warfare development efforts. The concept of Design Thinking adjusts to the complexity of the operational environment to improve speed, relevance, and consistency in decision-making. **OPPOSITE:** The scripting workshop for the upcoming exercise STEADFAST JUPITER 2021; Colonel Jean-Michel Millet, the JWC's Head of the Transformation Delivery Division, during a lecture on Design Thinking. Photos by JWC PAO

With the introduction of Design Thinking, training audiences increase their shared understanding of the exercise scenario and learn techniques to build collaboration, while mitigating "group think" and other biases within the planning team. Depending on the JOPG's level of experience, the JWC instructors can also provide lectures and practical exercises on the NATO Operational Planning Process, framing the operational-level problem, building an operational design, command-level briefing best practices, and observed friction areas throughout an exercise planning process.

The desired workshop participants are a blend of leaders and staff officers that traditionally take part in the JOPG and in planning activities across a headquarters. Workshop participants should not exceed 20 to ensure a focused learning environment for more critical and creative thinking. By blending leaders and staff officers into the workshop, better discourse will take place with leaders providing needed judgement and insight and staff officers providing subject matter expertise throughout the scenario-based practical exercises.

Above all, the JOPG Leaders Workshop provides staff officers a wide range of learning and development opportunities so that they can run well-structured operational planning

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groups in the future. While the JOPG Leaders Workshop can effectively be taught virtually, it is strongly recommended that the workshop be taught in person, and ideally, in a collaborative conference area where participants have a range of analogue and digital means to produce and brief developed products. During practical exercises, audience members will normally work in small groups to achieve workshop aims and develop JOPG products for later use during the CRP.

**Military planning is a scripted process** designed to solve a problem. Each level of war normally maintains a different process to turn unacceptable conditions into a desirable end state. Although many JWC exercise scenarios focus on the operational level of war, the JOPG Leaders Workshop is applicable across all NATO military headquarters. Whether in a JWC-delivered exercise, or in support of real-world operations, the principles taught during the workshop apply to all planning group echelons.

Lieutenant Colonel (Ret.) Robert Leonhard, a renowned military philosopher and scholar, argues that "a plan that doesn't survive first contact is a bad plan." Experienced planners tend to agree that flexibility is critical in developing sound plans. The observations by the JWC strongly suggest that the most effective





tive planning starts with appointing a good planning team. A well-structured planning team will deliver the planning that drives the commander's decision-making process, focusing on organizational discipline, time management, and a holistic understanding of the operational environment. Accordingly, the JWC-led JOPG Leaders Workshop is designed to help NATO commands anticipate potential issues and ensure the appointment of a proficient and effective planning team before they conduct CRP. ✦

Vision 2025 workshop, collective training syndicate



## FOUR REASONS WHY THE JWC IS THE RIGHT ORGANIZATION TO LEAD THE WORKSHOP

### 1 EXPERTISE

The long institutional experience in collecting insights and best practices from across every NATO headquarters enables the JWC to understand training audience tensions throughout the lifecycle of an operation.

### 2 ADVISORY TEAM

The subject matter experts that make up the JWC's advisory team are very proficient in NATO doctrine, as well as operational-level exercise planning.

### 3 RELATIONSHIP WITH NSO

The JWC maintains a close relationship with the NATO School Oberammergau (NSO). The JWC's JOPG Leaders Workshop complements the NSO's Comprehensive Operations Planning Course (COPC).

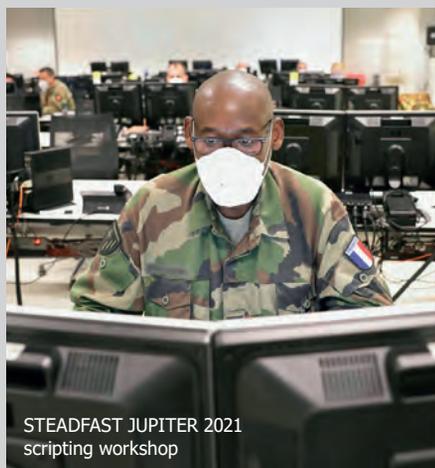
### 4 SCENARIO TEAM

The JWC is the exercise scenario generator of NATO and its advisory team accompanies the training audience throughout the planning process for each exercise.

VISION 2025

## THE THREE-DAY MODEL

- JOPG Leader Techniques
- Inductive and Deductive Reasoning
- Critical Thinking
- Whole-of-Staff Approach
- Situational Vignettes
- Practical Exercises
- Operational Art and Design
- JOPG Best Practices
- JOPG Lessons Learned



STEADFAST JUPITER 2021 scripting workshop