



By: Casey Dean

During the last few months of KD time I began to reflect on the things I wish I could have done better and captured those lessons. My goal was to pass these notes to my replacement in hopes he wouldn't make some of the same mistakes. An armor or infantry officer will have less than two years as an S3 or XO, so the first 3 months are crucial in establishing credibility within the organization. Since there isn't enough time in the world to cover all of my mistakes here are the highlights to help if you're in KD now or beginning soon. I hope it helps you.

Be organized to your comfort level

"If a cluttered desk is a sign of a cluttered mind, of what, then, is an empty desk a sign?"
Attributed to Einstein, but I could have done better. I'm a visual learner, so over time I learned to have a couple of things out in the open at all times. Latest version of our calendar/sync matrix, maps of our AO, and commander's guidance and priorities.

It's one thing to have a cluttered desk. Having a cluttered digital desktop is detrimental.

Ensure you have a system to save and organize your files for yourself and your team. For emails, I wish I would have [organized my inbox](#) into small (5GB or less) PSTs. This gives you the ability to quickly move them from desktop to sharedrive and if one corrupts, you haven't lost everything. For the organization, pick a strong junior officer or NCO to make the knowledge management guru and supervise your SharePoint/shared drive.

Synchronize your calendars up, down, left, and right

Our short-range training calendar was on Outlook. Everyone fought off this calendar in garrison and the chief of operations owned it. We struggled with developing a system that kept it synchronized between battalion level and company level events. For example, how does Alpha company ensure their FRG meeting was on the calendar; or how did we ensure Division knew our brigade LPDs were on the 3d Thursday of the month?

Because of our calendar troubles, our weekly staff sync meeting morphed into more of a calendar scrub. Staff sections were commonly not ready to provide feedback and inputs into the meeting. We never solved this lack of preparation and it bled into other areas such as MDMP.

It took several iterations, but we finally settled on an Excel sync matrix for the long-range training calendar. Easy to manipulate, but not PowerPoint friendly for training meetings. We ended up clipping pics in addition to bi-monthly plotter print outs. We used a second tab to track changes and had a primary editor with a few backups. The author would publish the calendar weekly; during Atlantic Resolve the distro list grew beyond the brigade POCs, seemingly all of USAREUR. It helped us get the word out up, down, and to our sister brigades.

Putting out fires vs presence

Knowing where you should be on the battlespace is fairly easy. The XO is typically in the TOC and the S3 is usually in the TAC. Knowing where you should be in garrison is bit more nuanced. Many times I had a choice to work on the problems of the day or sit in on a working group. And like the Knight said from *Last Crusade*, I often chose poorly. You don't want to be the staff firefighter, but your team will likely need you to stay engaged on some of the trending topics. Your experience and guidance will impact both areas so take some time to think where you're best needed.

Touch points with the commander

I was lucky to have commanders who were fine with going “ugly, early.” Many leaders are iterative and need the multiple touchpoints. As a battalion S3 I would wait too long for a “better plan” before updating the boss, or I would feel we didn’t have a presentation to show him, or time on his busy calendar. Because of this, I once missed the commander’s intent for a key portion of a dismounted live fire and only discovered it during final walkthrough. A simple in-progress review (IPR) using existing planning products would have given me the compass check that I needed. Blocking a plans update meeting once a week or every two weeks as part of the battle rhythm is a great way to keep the boss informed of what’s going on and get some guidance and course correction as required.

Tell your unit’s story

At battalion level, assign a tech-savvy LT or NCO as the unit public affairs representative (UPAR). Link them up with brigade or division PAO who should be able help with online training and talking points. You need to choose someone who enjoys the work, can write well, is lively, and engaging. Have a discussion on where you want the unit Facebook page or Twitter account to go. Is it purely informative, or at times a bit punchy and glib?

At battalion we had a fairly active social media account, but it was reactive. We didn’t enforce a weekly PAO and battalion UPAR sync meeting and it showed.

We should have followed the lead of our Brigade PAO who built a tracker during Atlantic Resolve that nested with major training, exercises, and partner events. He briefed it to the commander during the morning battle update brief for any additional guidance.

Don’t lose sight of what’s next

Platoon live fire was complete and the TOC was set to break down and convoy back to garrison in the morning. It’d be some great training the couple of weeks and I decided to stay with the guys one last night. Not thinking about what was next, I was ill-prepared when I returned to the office the next morning by some obvious questions from the battalion commander. Instead of focusing on the 5 meter target I should have started looking ahead at the calendar. You can do that from the field, but if connectivity is down, move to where you can get the work done.

Strive to maintain balance

There are several great examples of other leaders discussing [balance](#). One of my “aha” moments didn’t occur until halfway through my first year for me to realize I should go home

after PT. I lived on post and had plenty of time. I thought if I stayed at the office it would show my boss I was committed and ready to crush some hours. After a three-week field exercise, I decided that my work spoke for me, not the hours. By going home, I was able to see my wife and kids before they started the day and it made working late on some evenings a little easier. Balance is an individual contract with yourself, family, and work. Take some time to ensure you're meeting it.

Know your roles (and when to shift it)

At first, I struggled to understand my role as an S3. I was fine with my traditional responsibilities in the position, but had some difficulties on how I fit in within the leadership teams. You're not a commander any more, but still a valuable leader in the organization. After a few months I realized I needed to be myself and balance out what my wingman and battalion commander. If they are excited, be calm; if they are frustrated and angry, be the cool one. Then there are some times when you just need to slip your MEDO some cash and send him to the shoppette to buy tall-boy Modelos after a long day of LTP.

Review everything

Me to the AS3: "Does this Daily Tasking Order (DTO) have that hot tasking from brigade?"

AS3: "Yes sir."

Narrator: "There was no hot tasking in the DTO."

Make the time to read everything. Figure out your best way to review orders, presentations, etc. Print or on a screen; ensure you've built enough time and touchpoints before it's due.

Don't rush to failure on an order either. You can always email out a DRAFT to subordinates, but there's typically something not synced, missing info, or a piece that needs clarity before the final edition goes out. Your experience counts, don't assume others have caught everything from the commander's guidance or is fully synchronized across the staff.

Hold a weekly counterpart sync

We held a weekly S3 sync across the brigade that helped ensure the S3s were on the same page. When we were separated across Europe during Atlantic Resolve we held it on defense connect online. It's important to remember the BN S3's have their own commander, but you need their inputs and buy in. It's also helpful to level the bubbles during hectic pace. It was easy to tell when we didn't hold the meeting or battalions would skip it. There were always

many more missed suspenses, questions, and RFIs. I also learned that a short meeting can be better than no meeting at all.

Take care of HHC

The tiny headquarters section of a battalion or brigade HHC is fighting to stay above the water. At times, they need the top cover of the XO/S3 to support their priorities. It took me a while to realize how important it was to keep HHC in the fold. Bringing them into our weekly staff sync was a great way for them to hear, first-hand, the staff's priorities of work. Leading the way on PT tests, ranges, urinalysis, or mandatory training is a great way to show the staff no one is above the company. I also kept an open door for the commander and 1SG to talk issues or just vent.

These are a few of the missteps I made as an S3. Periodically assessing your lessons and capturing your mistakes to share with your fellow field grades or those coming behind you is a great learning tool.

Casey recently caught his post-KD breath as a battalion and brigade S3 in an armored brigade combat team. He's now rowing in the National Capital Region as an interagency fellow with Department of State. Connect with him on Twitter @Casey_D120 or casey.dean21[at]gmail.com.

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