

Like Hugging Grandma: Introducing Design into a Military Organization¹

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It is highly likely that we have all been there in some fashion. At a certain point when you are a child, you come to the realization that you are conflicted when it comes to hugging Grandma. On the one hand, you do not really like hugging Grandma because it somehow challenges your sense of personal space and independence. In some ways, it might just suggest a certain vulnerability or dependence you do not care to admit to yourself. On the other hand, once she has you in her arms, you may well appreciate the connection and affection the hug signifies...right up until the point that you are outside her grasp, allowing the cycle of avoidance and attraction to continue. Our experience since 2011 with design at US Strategic Command (USSTRATCOM) is amusingly (and frighteningly) similar. There are times when the headquarters out and out avoids any contact with design; at other times, it appreciates the insight and outcomes design enables, but only to a point when the appreciation passes and the resistance resumes. Riding such a roller coaster would naturally lead anyone to ask if design is ever an effective, appropriate, and lasting fit for a large military organization. Based upon the past six years' experience, in typical design-like fashion, we would suggest that it depends.

¹ The views expressed herein are the authors' own and may not reflect the official policy or position of Strategic Command, the Department of Defense, or the U.S. Government.

In 2011, the environment supported the formal introduction of 'design' to USSTRATCOM. This is not to say that there were not already select members within the command who practiced 'design-like' habits, but the command had not yet recognized design as a 'thing.' The confluence of several events provided the opening needed for design to slip in. First, the new commander, General C. Robert Kehler, made clear in his first guidance memorandum that it was his intention to institutionalize design throughout the command. Second, Steve had received repeated invitations from Colonel Ken Hurst, of US Special Operations Command (USSOCOM), to attend the USSOCOM Operational Design Workshop. Third, the command had come to the realization that its procedures (as governed by its internal concept of operations) had become too focused on solely responding to direction from higher, vice acting in ways that one would expect from an agile, information age organization. In the spring of 2011, we had no way of knowing how these three events would come together, but we did feel certain that an opportunity to effect change was in the making.

Our experience at the USSOCOM Operational Design Workshop was, without exaggeration, a crystalizing event. By the end of the first week, we knew we had found something that could enable effecting change in the command – if not holistically, then at least within our own lane of planning. In the time between the workshop's two weeks, we found ourselves in the middle of a rather tumultuous period. The new commander had demonstrated clearly his desire for change, but many in the command could not see how that change could become real in the land of nuclear surety and aeronautical engineering. For two misfits (a naval aviator and an infantryman), we did not feel the same constraints and looked for ways to leverage what the first week at Tampa potentially offered. By the end of the workshop's second week, we had not only tentatively established a logic for the command, but we were also firmly convinced that we had gotten glimpses of what design could provide the command charged with leading strategic deterrence planning for the US military. The question, however, was simple: How best to introduce design?

We did not have long to wait, as two opportunities presented themselves in short order. Both allowed us each to pursue different approaches to design, with differing results and impact. Steve, as chief of plans, found himself presented with the challenges of explaining the command's plans structure, as well as investigating ways to make our

plans more effective. Although Steve was the principal architect of USSTRATCOM's 'family of plans,' he was excited by the chance to explore the realm of the possible, particularly given that this work offered him the chance to test some aspects of design thinking, if not systemic operational design as Shimon Naveh and Jim Schneider had outlined at the USSOCOM workshop a few weeks earlier.² After engaging the commander with a broader view of the plans, Steve received direction to alter our plans – and the way we plan - in the most fundamental way possible. Over the next few years, Steve found himself leading – from the middle – change in a large (arguably huge) organization.³

Steve's approach to design, both for the planning and resulting process changes, was simple. Although formally trained in both mechanical and electrical engineering, he did not rely upon a reductionist approach, as most military-schooled planners are wont to do. Put simply, he focused the planning teams on *learning*. At every opportunity and engagement, he relied upon intellectual curiosity, critical thinking, and rigor to govern sessions. Instead of taking a linear approach (e.g., step 1, planning initiation; step 2, mission analysis; etc.), he led the teams through several iterative sequences to build understanding of adversary systems, test blue capabilities against those systems to determine feasibility, and then determine if the approaches were in keeping with the national guidance, as well as the commander's intent. This process found resistance at several levels, as it seemed to run counter to the traditional, sequential 'higher plans, then passes those plans to lower for more planning' process. In almost every case, he found that smaller groups enabled this type of work, particularly when the participants were like-minded (i.e., put a value on creativity, inquisitiveness, and rigor).

Finding those 'like-minded' individuals was not a small matter, as their participation was critical to success. Because planning groups often comprise 'Who shows up,' vice 'Whom I pick,' Steve's long-term success was almost completely dependent upon his own personality and his ability to engage planners in such a way

² Steve does not feel constrained by his planning experience, so the 2011 Naveh characterization that 'Planners are monkeys' did not scar him as deeply as Dave, an Army-schooled planner.

³ In this context, we would define 'leading from the middle' as 'motivating and guiding both seniors and subordinates equally, often without formal authority.'

that he could determine who would thrive and contribute materially in an environment that was 'non-standard.' It was also completely on his shoulders to manage the relationships with other planners who were more comfortable in following the 'planning process.' These observations are not stated lightly, nor are they meant to be self-adulatory; we offer them only as insight for others who may face a similar situation. In an organization populated almost exclusively by missileers, satellite operators, and nuclear submarine crewmembers, finding individuals who do not live, breathe, and completely embrace a reductionist mentality are few and far between. As a result, this command's ability to 'do' design in this context rests almost solely on a few individuals' ability to recognize, connect to, and work with other designer-like folks.

In situations where the groups were larger by necessity, Steve found that there was often less learning overall. In such cases, Steve would often conduct follow-on sessions (usually on a white board) with a (or 'the') smaller group to move the planning along. In his mind, 'design' and 'planning' are not separate activities, processes, or events. Instead, 'design' and 'planning' are both activities underpinned by *learning*, a proposition that US military doctrine is only now beginning to recognize formally in its publications.⁴

Dave's experience took a different path. At the behest of Major General William F. Grimsley, the command's chief of staff, Dave was charged with establishing a Commander's Design Team. Envisioned to possess 10 individuals, the team would be responsible for development of the command's strategy. Early on, he had the remit to recruit, interview, and petition for select individuals throughout the command. The selection process, by itself, was both illuminating and instructive. Believing that 'design traits' are more innate than learned, he developed a battery of questions to interview potential candidates. Atop the list were questions intended to ascertain a candidate's comfort level with ambiguity (based upon the assumption a reductionist would seek to avoid it) and his or her level of intellectual curiosity (based upon the assumption that an autodidact would better underpin exploration). Once the interviews were complete, Dave considered them in consonance with the individuals' Myers-Briggs Type Indicator

⁴ That being said, what the joint publications say, what the schools teach, and what the field practices, however, are often different.

(MBTI) results to ensure a 'best fit' recommendation for the team's composition, going forward to the chief of staff for decision to detail those individuals to the team.⁵

Viewed by the commander as an asset, the team had access to the command group and produced several 'think pieces,' as well as drove other command engagements. It had the opportunity to dive deeply into theory (organizational, economic, political, etc.) to provide it the tools necessary to pursue 'strategic systemic design.' By the following autumn (2012), the team had developed to the point of possessing its own theory of design. When it became apparent to the team that producing a strategy would undermine other efforts the commander had underway, it 'self-reported' that its very purpose (development of a strategy) ran counter to the greater needs of the command, arguably a testament to its ability to sense the environment and assess need. As a result, the team's remit changed to tackling broader 'macro-problems' for the command.

With General Kehler's and General Grimsley's departure, the team's role shifted from consistent engagement to one of a more episodic nature. In the midst of mandatory reductions, the team no longer has the ability to hand-pick individuals; instead, the team continues to rely upon detailed individuals from the plans and assessments directorates. The team continues to contribute to the command through the directorates and self-selected engagement opportunities, but it does not currently possess the access to the command group it once had. Interestingly, our experience with a formal team parallels that of our experience with informal organization: Both rely upon personality. In this case, though, the team relies upon the personality (and interests) of the commander. In this situation, current military writings on the centrality of the commander to design are entirely accurate. With a recent change of command, it remains to be seen if, or how, the team's remit will change.

Although our experiences have followed different paths, they both suggest some common observations. First, in describing our efforts to introduce 'design' to USSTRATCOM, we often find ourselves being asked, "So which type of designers are you? Are you post-modernists?" Depending upon the audience, how we choose to

⁵ With regard to the MBTI results, a 'best fit' equated to a fairly even distribution, where possible, of MBTI types (e.g., not all individuals are introverts, etc.).

respond could well make the difference between a spirited, professional discussion and a condescending dismissal. Put directly, we are not philosophers, and while we have taken courses in philosophy, the environment and demands of our work do not lend themselves to think about our efforts in terms of ‘post-modernism,’ or any other school, for that matter. Although we openly admit that we were taken by the newness and density of design early on, we have come to the realization that use of labels, or attempts to categorize ourselves in specific ways, actually works against what it is we are trying to accomplish. We seek to discover or illuminate boundaries and assumptions, challenge them, and possibly create something new, based upon what we have learned. Attempting to label this process, if that is what it is, seems to us to predetermine a frame of reference, which seems to be the exact thing we are trying to avoid.

One of the more widely espoused views among military individuals (both active duty and retired) is; “We’ve always done design; there’s nothing new here.” We both agree and disagree. We are completely of the view that design must involve the commander; we openly admit there is nothing new about that. We also agree that a commander’s ability to visualize the environment is critical, although we would suggest that what we believe comprises ‘understanding’ may be broader than what the service schools have taught previously. Where we disagree, however, is the imperative to challenge ‘what is’ to bring about learning, particularly at the combatant command level. ‘Problem framing’ (i.e., making sense of what needs to be done) is arguably more pressing and challenging than mission analysis (i.e., analyzing a higher organization’s instructions for what needs to be done), as it is unlikely that the higher organization has had the time or resources to frame the problem correctly. The most amusing aspect is that because we fall between the two stools (i.e., not adherents to one design school, nor disciples of the military planning processes) we are often treated with reserve by both camps. In many respects, this is actually an advantage because it frees us up to employ whatever techniques we need to support the command without regard to their origins.

Second, personality-driven design (whether ‘design’ as a process or ‘design’ as an aggregation of intellectual behaviors) is just that. Without a ‘designer,’ there is no ‘design,’ particularly in military organizations where reductionist thinking is the basis for almost all intellectual activity. Given the right combination of individuals, design is

powerful, and in Steve's case, brings about far-reaching impacts, but it is completely dependent upon one individual to recognize others and attract them to the effort. Further, the burden is almost solely on that individual to read the environment and shape the engagements with the broader organization in an appropriate and constructive way. In an organization still influenced by 'The SAC Way,' the introduction of a series of seemingly disruptive behaviors comes with certain risks and burdens.⁶ As one might imagine, any military organization views those who ask questions with a jaundiced eye, and Steve had (and continues) to navigate the shoals of organizational and personal agendas. Not only did he have to balance the dynamics within the planning teams (i.e., employ the right people in the right way while not alienating others), but he also had to control the narrative among the broader enterprise (e.g., 'We are doing planning' [a familiar term] vice 'We are doing design' [a loaded term, depending upon the audience]).

Attempting to 'pool' those types of people (i.e., 'designers') in one place through a formal organization does allow the team members to 'sharpen saws' together in a structured way, but maintaining an organization's willingness to resource such an endeavor is difficult whenever there does not seem to be an immediate, tangible gain. With military organizations that experience regular turn-over of seniors, such a perspective should not be unexpected. Further, the introduction of an organization formally and openly charged with 'doing design' also comes with risks and burdens. With the right seniors in the right places, 'design' is a term that gains positive attention and support; with other seniors who might take a suspicious or adversarial view of 'design,' a team's survival over the longer term is significantly harder to maintain.

The belief by an organization (either informal or formal) that it is constantly under scrutiny and living in the margins may lead to a 'siege mentality' that can often undermine its effectiveness. In both Steve's and Dave's experiences, the introduction of design to USSTRATCOM took the form of attempting to do the right things (e.g., use design as a way to improve planning or to tackle the command's 'macro-problems') for

⁶ US Strategic Air Command, USSTRATCOM's predecessor, viewed itself as the organization charged with ensuring national survival through its ability to launch nuclear-armed aircraft and missiles within minutes. This level of readiness was only possible through well-developed procedures and the discipline necessary to follow them immediately and completely.

the right reasons (e.g., address a perceived shortcoming or need). Neither considers his efforts over the past five years to be ‘subversive’ or ‘insurgent-like,’ terms often used by some to describe their experiences in other organizations. Although in almost every case use of those terms is euphemistic or emotion-laden, we would suggest that they may actually damage a broader change (if not transformational) effort, as both ‘subversion’ and ‘insurgency’ have commonly accepted definitions – definitions that involve synonyms like ‘overthrow,’ ‘undermine,’ or ‘ruin.’ Instead, we would champion the term ‘lead from the middle’ as a way to characterize our efforts to bring about change in a larger organization.

This broader discussion does lead to some rather difficult – and, for designers, soul-searching – questions. How does an organization maintain its interest in a capability that may provide deep, long-term benefit when the seniors will likely not see the payoff during their tenures? How does the military encourage (and reward) design, systems, and creative thinking in individuals who, from their very first day, are trained to be reductionists? Can you really ‘train’ design? How does an organization identify and employ designers in such a way that does not violate the military’s cultural lens of interchangeability of individuals and immediate compliance with higher direction?

Our experience as two civilian members of USSTRATCOM leads us back to what we said at the outset. Each large military organization has at least two or three like-minded designers who likely bond together, either through informal relationships or through formally-established organizations, in pursuit of common aims. In Steve’s case, he was able to find and employ such people through the conduct of his planning efforts; Dave was able to find them through an organizationally-mandated selection process (at least in the early years). In both cases, design enabled the achievement of outcomes that would not have been possible through a reductionist approach. For that reason alone, neither would advocate for the distancing of the command from design. At the same time, we are both firm in our belief that design is not for everyone, and that attempts to establish a ‘methodology’ or ‘process,’ which is what most military organizations seek as a matter of course, is antithetical to the concept of design as an intellectual and creative pursuit.