"Knowledge Management of Human Resources:
A Means to Enable Success at a JRTC DATE rotation"

By Captain Mandi Rollinson

Knowledge management, "the process of enabling knowledge flow to enhance shared understanding, learning, and decisionmaking" (ADRP 6-0), is a concept that might be stereotypically confined to those in the Signal, Intelligence, or Cyber communities. However, that would be wrong. Truth be told, the efficient control and sharing of information whose output is actionable is the job of all leaders, regardless of branch or position. Knowledge management executed as a Squadron S1 can directly enable the success of the Squadron, and indirectly the Brigade, during the preparation and execution phases of a JRTC Decisive Action Training Exercise (DATE) rotation. What follows is one methodology of integrating knowledge management by means of considering how you will acquire the knowledge, organize it, prepare to share it, and then share it effectively and efficiently.

Before being able to manage knowledge, you first need to be able gather data and transform it into information. While executing a duty as vital to the lifeblood of an organization as the S1, you need to tap into your experiences as a leader and Human Resource (HR) professional because these will guide and tailor your intuition into what tools you'll need. For example, 2 months prior to deployment to JRTC, I knew from experience that the "XMAN manifest" (a manifest formulated in a manner that a rapid deployment facility or personnel terminal's manifest databases will accept the spreadsheet upon import) would be a requirement. I also knew that with the movement to the Sustainable Readiness Model (SRM) out of ARFORGEN and the emphasis on Objective "T" (OBJ T; a standard of attendance of 80% unit personnel authorized) would require a by-name tracking. These two factors, coupled with the need for the future rear detachment leadership needing a by-name roster of personnel not deploying, meant that when I worked with the S3 tasking officer, I specifically structured a template that was in the XMAN format and included names of all Soldiers in the Squadron with standardized and pre-approved reasons for not attending (such as PME, Borrowed Military Manpower, or Pregnancy/Post-Partum). This then prompted troop leadership to ensure that they accounted for all names and validated reasons before they were reviewed by Squadron leadership. Once I received this list back from the Troops, I had my data in the format I needed it, ready to manipulate and transform into something meaningful.

Once you acquire your data and begin manipulating it into information, you need to consider how you are organizing it. Even if you maintain all this information in a spreadsheet equivalent to a list, making deliberate decisions of the ordering, descriptions, and capabilities of the columns and even the cells themselves has lasting implications. The ideal balance to strike is one that will save your future self time, while also being able to feasibly manage all the information in a time-efficient manner. That's when you incorporate a combination of formulas,

conditional formatting, filters, and even drop-down menus and pivot tables to accomplish this. Specifically, I highly recommend the use of the COUNTIF/COUNTIFS function. As an HR professional, I have lost count of the number of times a senior leader asked me "how many": - how many impact awards, how many legal packets, how many present for duty, how many deploying to JRTC? COUNTIF goes beyond SUM by allowing you to count criteria (count "Yes" in the deploying column, for example) versus just adding numbers together. Conditional formatting, while it has the capability to handle very complex structures, can also be used for singular requirements. For example, if the number of personnel attending JRTC equals the number that yields the unit to meet OBJ T standards, then instruct excel to highlight the cell in green. If the cell is less than that number, then highlight in amber. By structuring your data in this manner, you are considering your future audience and starting to prepare to share your document with others. The usage of filters ensures that you keep your data easier to manipulate and is a great preparatory step to executing a pivot table. That, in addition to drop-down menus, which forcibly standardizes input into cells, ensures that the pivot table produces reliable results that are near live tracking. Having done included these considerations, it's time to move on to the next step of finalization your product to prepare to share it.

After you have structured your information so that it makes sense and has some flexibility in its presentation, it's time to come face to face with the idea that you will be sharing this information beyond your office. In fact, as the S1, it will almost certainly at some point go to the Commander and/or Command Sergeant Major. It's time to transform that information into knowledge and make it useful. When I was executing my pivot table for JRTC attendance tracking, I used the space below the pivot table to enter in MTOE authorizations by troop, and then attendance by troop (linked to cells in the pivot table), thereby enabling the simple formula for strength (the result of attendance displayed as a percentage equating to our compliance to OBJ T) to be the single takeaway for senior leaders in the Squadron. Combined with the pivot table of pre-approved reasons of non-attendance immediately above the attendance strength, a senior leader had sufficient information to clearly articulate the Squadron's status and how we got to there. In short, the product was ready for me to share.

The last step is to release the wild data that you have wrangled into knowledge back into its natural habit, because all this work is worth nothing if you hold onto it. At the very least, you won't learn how to do better next time (and we all know from experience there will be a 'next time'), and at the worst you are withholding knowledge from leaders that will enable or inform their decisions. For the curious minded, the revelation of how to plan and perform better for the next iteration is nothing like Archimedes' or Newton's revelatory moments. It will usually arise after you or a Soldier in your shop is personally typing in new data into one-third to one-quarter of your unit's manifest. It then dawns on you that, if you had just made it part of the template in the first place, you wouldn't be dealing with this right now. You will get better with each iteration of this knowledge management cycle, and you will be able to apply it to different problem sets. In addition to the problem set of how to track attendees of JRTC and be able to convert those

names into a manifest, I also put considerable thought into how to track casualties once my Squadron was in the box and fighting Geronimo. One of the finer points of this was that I decided it was worth the effort to include 'platoon' as a column on my tracker, not something I would usually do. As anyone with experience in an S1 shop knows, there is no Army automated system that looks at the platoon-level with clarity. I would therefore have to rely on reporting, the accuracy of my battle roster number list (also based on previously referenced manifest), and being in sync with the TOC. I could then ensure I was using commonly understood terminology that would immediately anchor us all to the same SITREP being referenced. Then we were using time to move forward with an update instead of wasting it trying to find a common language. Instead of inarticulately asking "what happened to those Alpha Troop casualties this morning", I could instead ask what happened to Red Platoon, Fox Troop casualties from a specific date time group (an additional element of my tracker) in the vicinity of a specific city or grid by whatever means was the cause. The result was that I spent less time on the TOC floor asking what someone meant, and more time on the radio or battle tracking the movement and replacement of casualties. This then resulted in senior leaders in the Squadron being able to focus more on the battle and less on replacements, more on making future decisions and less on the impacts of the past.

The result of all this was that in a fight that you're not meant to win, where the cards are stacked against you, and the enemy already has predicted your actions before you've even thought of them, I think we can all agree that these results were time well spent. That's what comes of an additional formula to total personnel or a color to code a completion status. HR professionals aren't resigned to merely playing with numbers just to say we're competent in Microsoft Excel or because we're fluent in so-called AG Geek Speak. Instead, we are charged with the balance of lives and combat power, to be an advocate for the importance of our Soldiers in our units to accomplish our mission, and utilizing knowledge management significantly bolsters our ability to execute these. In short, we're executing the core competencies of Man the Force and Conduct HR Planning and Operations. In layman's terms, it's taking care of Soldiers and being a good leader. You don't have to wait to be a platoon leader or a company commander to exude that passion or make a difference in a Soldier's life. Plenty of actionable opportunities exist in the Squadron or Battalion S1's realm of influence. I know that I found plenty.