

Use the U.S. Army's approach to continuity planning

By Guest Contributor

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By Mark Lefcowitz, PMP, CBB

The best kinds of conversations are those that end up with the mental light bulb going on overhead, punctuated with, "Aha!" I had one of those "Ah-Ha" moments with Mark S. Sullivan, MPRI, recently during my almost daily raid on his desk coffee pot. It is bad manners to just help yourself to someone else's coffee, without so much as a please or thank you. And so I always make certain that "Sully" is sufficiently aware of my gratitude by bending his ear about something interesting to me, until such time as he's had enough and throws me out of his office.

In this particular case, we were discussing how difficult it is to accomplish organizational transformation with high levels of staff and consultant churn. Sully reached into his drawer, and pulled out a 3-ring binder and waved it in my face.

"That's why I have this."

It was a continuity book.

Business Continuity Planning (BCP) has been hot stuff ever since Y2K, and even more so since 9-11. IBM's Redbooks TechNet defines business continuity as:

The processes and procedures an organization puts in place to ensure that essential functions can continue during and after a disaster. It seeks to prevent interruption omission-critical services, and to reestablish full functioning as swiftly and smoothly as possible.

Not surprisingly, it has come to be skewed toward enterprise disaster and physical security issues.

But that was not what Sully was talking about. Rather, he's referencing an older usage of the phrase, almost exclusively used by the United States Army. A continuity book is:

". . . Reference document produced by an individual to share relevant information concerning a duty or position on which he/she has knowledge. It is normally produced for an individual assigned to take over that duty or position, such as a replacement NCO designated to substitute a departing squad leader. If a soldier has more than one duty, he/she should have several continuity books".

--CPT Leonel Nascimento, USA, Military Analyst, CALL

There is no formal requirement within the United States Army regulations for soldiers to produce a continuity book; it 's just something that's been handed down from individual to individual for who knows how many decades. If you have ever received one, you know its value.

The Bureau of Labor Statistics estimates that the annual rate of job turnover from August 2005 through July 2006 was at 40.2 percent. Forth same period, new hires made up 42.6 percent of the working population. This indicates that over the past 12 months, at least 2 out of every 5 jobs were income state of transition. And to get back to Sully's and my conversation, it makes the already arduous task of organization transformation even more difficult.

That's when I had my, "Aha!" moment. Why not require continuity handbooks as a routine job task throughout the enterprise?

According to Jack Welch, former CEO of GE:

"If you want to manage people effectively, help them by making sure the org chart leaves as little as possible to the imagination. It should paint a crystal-clear picture of reporting relationships and make it patently obvious who is responsible for what results."

In the Army, the document they use for this purpose is called an Operations Order (OPORD), a directive issued by a leader to subordinate leaders in order to affect the coordinated execution of a specific operation. Alive-paragraph format is utilized to organize the briefing, to ensure completeness, and to ensure subordinates understand the order completely. The five paragraph headings are: Situation, Mission, Execution, Service Support, and Command and Signal.

- The *Situation* paragraph provides a general overview of the battlefield, the big picture
- *Mission* is a clear and concise statement of the unit's purpose and task, in detail, giving the "who, what, when, where, why."
- *Execution* contains the very detailed and precise "how to" information needed for accomplishment of the mission, consisting of three elements: concept of operation, subordinate unit subparagraphs and coordinating instructions.
- *Service and Support* contains all Combat Service and Support information, including transportation, supplies, maintenance, MEDEVAC procedures, Enemy Prisoners of War procedures, personnel replacement, etc.
- *Command and Signal* consists of information and instructions relating to the commander. It includes the location of the commander, location of the Command Post, and if different than SOP the operational chain of command. The signal portion of this paragraph addresses all communications information. It gives all frequencies, call signs, duress codes, pass words, communications windows, near and far recognition signals for day and night, pyrotechnics signals, etc.

Upon receipt of an OPORD from one's superior, an officer prepares his own OPORD for distribution to his own subordinates. Each successive OPORD contains elements of the two OPORDs that precede it, thus ensuring that subordinates have an awareness of the bigger picture objectives, and their unit's part in it.

Obviously, such a document would need to be slightly altered to be appropriate for non-military use. And to make it work, the initiation and maintenance of a continuity book would need to be an important part of every worker's evaluation process, from the CEO down to the lowliest support pro. However, as Sully pointed out to me, armed with an OPORD and a continuity book, any individual within any organization will know exactly what their job is, how to do it, and what prioritization should be given to the tasks and goals assigned to them.

From my point-of-view, the idea has one more important outcome: It is a simple and straightforward way of initiating organizational transformation, which makes other transformation tasks and goals possible.

Aha!

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