First Names, Sticky Notes, and Fun

A faster way to make better requirements

by Maj Ryan Keller

What if I told you that, right now, there is an available time-efficient method for breaking down complex problems that is actually fun to participate in, is actively spreading among the Naval Services, and has experienced operatives ready to implement it for you? You are thinking I am a vendor trying to sell you consultation services with a big foot in the door already. Instead, I have just crested over a decade of service in the Marine Corps and, at no cost to my unit, I learned in two days something I wish I could have been applying and honing my entire professional career: warfighter centered design (WCD). Before we get into what WCD is—first names, sticky notes, fun—we need to take a look at why we need it, who needs it, and where we need it. A good place to start is the requirements generation, assessment, identification, approval, and prioritization for the Marine Corps: the Marine Corps Capabilities Based Assessment (MC CBA) process and the Joint Capabilities Integration and Development System (JCIDS).

As an average Marine relying on the Force Development System and JCIDS to deliver a capability, it is easy to get disheartened discovering that the flash-to-bang time for simply identifying a need and translating that into a validated Marine Corps requirement is half of a first-term enlistment. The five-phase process of MC CBA, the campaign of learning followed by four phases of analysis (capabilities, gaps, solutions, and risk), feed both the JCIDS process and Planning, Programming, Budgeting, and Execution system.[1] The Planning, Programming, Budgeting, and Execution part of the pipeline is far too late to enact meaningful changes to requirements, so we need to ensure that the three to four years prior to execution is spent getting requirements right. It is no secret that operational units routinely complain of poor gear or vehicle design, bad software, or useless equipment that continuously needs to be accounted for on the unit's consolidated memorandum receipt. You may have heard Marines ask questions like, "How did something like this ever make it this far?" or "Why would we waste money on this?" The root concern of questions like these can be summarized with a similar question, "Who generated these requirements?" The key term there is "who"—human beings, just like the Marines being supported with materiel solutions that have the same capacity for empathy, creativity, and a desire to serve their country. These people are the helmsmen of the MC CBA and JCIDS processes: the stakeholders, the advocates, the requirements managers, who participate in bodies like capability portfolio integration boards, working groups, review boards, and numerous integrated product teams. Why is there a disconnect between those "people" and the "people" whom they ultimately serve?

Congratulations, you are about to become a capabilities integration officer (CIO) and conduct a PCA straight out of resident Command and Staff College to the Davis building. What are you going to do with some operational experience under your belt and some fresh education about Marine Corps staff functions and the joint environment? You are about to be handed a cubicle and a portfolio of programs that the Marine Corps is responsible for funding and maintaining requirements for. Your battle buddies are the material developers at Marine Corps Systems Command for the litany of programs you probably do not understand but are responsible for nonetheless. Additionally, every year between October and February, you have to stop everything that you are doing and figure out how your programs will be funded through the program objective memorandum (POM) cycle—ensuring that you are paying for things with the right color of money through the Five Year Defense Plan and briefing it to the frog and the prince of POM while trying not to upset your requirements manager. If that is bewildering to read, imagine how that new action officer feels as the curator of that chaos. Regardless, that action officer is responsible for translating the needs of Marines into requirements for specific programs, and she does not have time to pontificate on the essence of what requirements should be because she is under so much pressure just to maintain what the Marine Corps already has. If only there was a way to inject a forthcoming human-centered design industry standard at multiple points throughout a multi-year process, perhaps teaching these skills at resident PME or through the Defense Acquisition University action officer course before that CIO assumes responsibility, to enable more intimate human connec-

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tions—something in stark contrast to the bureaucratic rigor and establishment mentality that can mend the schism between warfighter needs, requirements generation, and the acquisition and fielding of capabilities. Enter the Centers for Adaptive Warfighting (CAW), their coalition of the willing, and their crusade to eradicate planning fatigue and spur (wait for it) innovation within the military and acquisition ecosystem.

Let me offer a palatable interpretation of "innovation" as it was described to me by Dr. Peter Denning and Col Todd Lyons, USMC(Ret), "Innovation is the adoption of a new practice in a community."[2] They also assert that driving the adoption of a new practice requires practitioners within that community; that seems fairly straightforward, but the emphasis on people cannot be understated. In February of this year, GySgt Brandon Smart, Maj Peter Thermos, and Capts Aaron Barlow and Jon Margolick made their case for the CAW, in a *Gazette* article entitled "Manueverists for Agility," and how the CAW "focuses on best practices from industry, field-stripping them for entry-level classes in which every Marine can practice the material and has a chance to excel."[3] The CAW offers a condensed, effective series of classes that have the power to change the way you think about doing business on a daily basis. While Marines and Sailors have been benefiting from CAW training and bringing it back to their operational and supporting units, the CAW is teaching anyone in government service—civilian, military, or otherwise—who is interested in employing agile methodologies in their workplace. Personally, I have witnessed how WCD has invigorated participants with varying levels of seniority, and harvested insights that have contributed toward identifying creative solutions across multiple and diverse problem sets including: command climate issues, course of action development for establishing artificial intelligence-focused Marine Corps investments in academic institutions, and developing scrum epics (fancy agile terminology that basically means objectives) for a team working on a tactical machine learning project. WCD facilitators begin to think differently the moment class starts; and by the time they return to their command, they have already thought through dozens of areas they can inject this new way of problem sourcing and solutions development—their training immediately pays dividends. The people propping up the CAW have even found out how to teach people remotely while we all practice social distancing, so physically attending a session requires you to be at the computer that is probably within arm's reach—no excuses.

Time, our most precious and vulnerable resource, is required from everyone up front. *(Photo by author.)*

Avoiding the ground already covered in "Manueverists for Agility," I want to focus on the implementation of WCD to demystify my claims and expose some tangible concepts. I have established that our requirements processes rely on people at their core, and requirements generation is fraught with meetings between those people. WCD is not going to change our processes, but flavoring them with knowledgeable facilitators can breathe new life and garner fresh insights from people who must be in the room any way. WCD facilitators always operate in pairs, so think of a WCD facilitator like a two-for-the-price-of-one personal trainer; there is no effort on your part to come up with the workout or decide what to do next, you just have to have a goal, follow along, and listen while applying effort to reap the benefits you desire. What do you have to lose other than saying you tried some innovation on for size? Before we take the plunge, there are some cover costs you should know about to get the full benefit from WCD.

To achieve a successful WCD session, you will need to invest two of our most precious commodities: time and integrity. Time, our most precious and vulnerable resource, is required from everyone up front. To soften the blow, I will put it this way: if you have a week's worth of homework to do and you know about it on Sunday, what happens if you front load that effort and get everything done by Monday evening? You now have white space to juggle the other competing needs and wants in your life. WCD is no different; you will spend more time up front getting all the stakeholders and subject matter experts together for a long session or two, but the results will amaze you and make you hungry to do it again. One caveat, our saturated CIO does not get to enjoy any white space because there is always more to be done, but WCD stands to make the time she spends with others more productive. The second cover cost is your integrity in the form of a commitment to a social contract—trusting the methodology and becoming a willing participant until the bitter end. This

brings us to our first WCD requirement, first names only, followed by the remaining two, sticky notes and fun.

The WCD social contract hinges on participant conformity, specifically from the senior ranking members. Yes, this type of innovation requires conformity, which is blasphemous at first pass and a departure from the spirit of innovation, but it is critical to success: no side conversations, no personal attacks, no assumptions that you have the best ideas, listen to the others around you, and respect the time hacks. First names only: WCD flattens rank structure by forcing everyone to wear civilian attire, using only first names, donning nametags, and engaging in ice breaking exercises with your fellow participants. This is where I will lose most readers as they groan about how I am propping up a futile exercise focused on feelings and emotions and not enough on production—you are wrong. When was the last time you were productive during a meeting you wanted to escape while being lectured by a superior with an inferior understanding on a topic? WCD clears away the hierarchical power structure to allow ideas to flow freely, inspire other ideas, and let ideas stand on their own merit, but only if participants adhere to the social contract that facilitators require to help guide the group toward collective success. The whole point of bringing WCD into our CBA and JCIDS meetings is to let everyone speak the same language and allow the collective expertise of the group to pollinize one another; PhDs, colonels, lance corporals, operators, financiers, system engineers, contracting officers, or any other professional who joins the fray will have equal footing and opportunity to help the group reach the best solution. You are forbidden to command everyone's attention and break the pace of divergent thinking simply because you have been doing this for 30 years. There will be a "parking lot" board or wall where you can post ideas that you need to get out of your head immediately but may not be relevant to the current exercise. Your coveted rank structure awaits as soon as you are done throwing sticky notes up on the wall, which brings us to our next requirement.

Sticky notes. WCD engages participants in human-centered design practices like divergent and convergent thinking that leverages your team's diversity and rapidity of thought to leapfrog off of one another's efforts and achieve insights that are locked away behind the old way of doing business. Status quo round-robin meetings are dominated by thinking about what you are going to say when your turn comes up, whereas WCD requires you to listen to your colleagues riffing around you and encourages capturing those thrilling moments of epiphany, which will come to you, on a small square sheet of paper to share with the group. The resulting thought discovery session is invariably captured on high contrast notes and posted for everyone to see and draw inspiration from. At the end of the day, all the expended effort is captured for posterity on tiny pieces of sticky paper. The physical tools you need to harness your team's energy are a literal room to walk and think, blank walls, rolls of butcher paper, painter's tape, and office supplies such as sticky notes, name tags, and permanent markers, that's it. Once you have the physical materials, which are all probably right down the hall in the supply closet, there is nothing stopping you from conducting WCD except for a parochial mentality and resistance to modernization. Once you let a little WCD into your life though, change will not be so scary because you will be experiencing our last requirement, fun.

WCD makes planning fun because it involves comradery, discovery, encouragement, and productivity. Fun: there is no secret that what you enjoy doing receives an exponential heaping of your effort, and fun is a prime catalyst to exposing your productive nature to the task at hand. The fun from WCD comes from doing things a bit differently during work hours, the personal process of discovery and witnessing the same in others, and chiefly from interacting with your working group in a safe environment on a problem that everyone cares about. Encouraging others lifts up the whole group. It empowers those who do not normally have a say to join the conversation, often with force multiplying effects.

I will end with an offer: seek out WCD trained professionals in your midst and ask for their help because they are probably close by and will be eager to help decompose your problem into digestible lines of effort. If you have made it this far, you have at least shown tangential interest in what the CAW has to offer, so I encourage you to head over to their website and sign up for the next class. The time to train and implement may seem insurmountable and although having facilitators who are knowledgeable about the problem is nice, it is not a requirement to successfully orchestrate a group that knows about the problem. Take a risk and let one of your best try WCD out or go yourself and bring the lessons back. Embroidering WCD into the horse blanket of Marine Corps requirements generation and vetting processes will not upset the fabric of how we do business. The assessment, identification, approval, and prioritization of requirements will always exist, but we may be able to squeeze more blood out of that stone if requirements owners and managers are willing to accept first names, sticky notes, and fun as a way to make better products for the people we are all truly trying to serve, the warfighter.

Notes

1. Headquarters Marine Corps Combat Development & Integration, *United States Marine Corps Force Development System User Guide*, (Washington, DC: 2018).

2. Peter J. Denning and Robert P. Dunham, *The Innovator's Way: Essential Practices for Successful Innovation*, (Cambridge, MA: The MIT Press, 2010).

3. Brandon Smart, Peter Thermos, Aaron Barlow, and Jon Margolick, "Maneuverists for Agility: The Marine Corps Needs to Adapt and Innovate," *Marine Corps Gazette*, (Quantico, VA: February 2020).