

# A View From the Pointy End

Special operations forces perspectives for Marine Corps intelligence support to information operations

by Maj Paul L. Croom II

The Marine Corps has obtained several significant milestones in the endeavor to define and refine how to operationalize information operations at the tactical and low operational levels of conflict, including the establishment of the Deputy Commandant for Information (DCI), the transition of the MEF headquarters group to the MEF information group, the creation of information operations (IO) primary MOSs, the participation of II MIG's Information Coordination Center (ICC) in Exercise TRIDENT JUNCTURE 2018, and the creation of the *information* warfighting function. Still, conceptually nascent and inconsistently integrated even within the force, Marine Corps IO's maturation remains labored.

As an institution, the Corps seems to have realized the information environment (IE) is the decisive battlespace for the foreseeable future. However, by failing to adequately forecast the primacy and potency of information in the geopolitical landscape, we are now forced to build the proverbial IO airplane while we fly it. Even more fundamentally, from an intelligence perspective, we are only beginning to understand that successful intelligence support to IO requires a nuanced application of both traditional and non-standard tradecraft. Essentially, we are attempting to design and construct an airworthy IO craft while piloting it in an atmosphere where we are uncertain if existing laws and rules of physics and thermodynamics apply to use anymore. We do not understand the IE in which we are attempting to operate

**>Maj Croom is an 0202 MAGTF Intelligence Officer, 8247 Western Europe FAO, and 0510 Basic Information Operations Staff Officer. He recently completed a deployment as the first-ever Information Operations – Intelligence Integration Officer with a special operations joint task force supporting global transregional counterterrorism operations. He is currently assigned as the Deputy AC/S G-2 for 2d MarDiv.**

but are obligated to operate within it nonetheless. In this, lessons from Marines working in or with intelligence and IO in real-world environments can be of particular interest to the DCI. Accordingly, the following observations and recommendations from a recent deployment as the Information Operations–Intelligence Integration Officer assigned to a forward deployed combined, joint, interagency task force sup-

porting transregional counterterrorism (CT) operations provide this relevant context.

## Winning Is (Sometimes) Hearts and (Always) Minds—and It Happens in Phase 0

Transregional CT operations are inherently complex. By their nature, the relationships between target individuals (TIs) and target audiences (TAs) in de-



**II MEF subordinate staffs plan to support Exercise TRIDENT JUNCTURE following Hurricane Florence in 2018. (Photo by SSgt Melissa Karnath.)**

clared theaters of active armed conflict (locations where lethal and less-than-lethal military force can be directly applied) and TIs and TAs outside declared theaters of active armed conflict cross sovereign lines and often involve nations allied with the United States. Terrorist actors may be anywhere along the “aspire–plan–prepare–execute” continuum, amid their chosen target environment that is blissfully plodding along in a pre-threat state of consciousness. Where possible and practicable, CT operations look to neutralize the threat prior to execution. Equally though, CT operations—and CT information operations (CTIO) more specifically—must seek to address the conditions that underpin the viability of transregional terrorist activity. These are the Phase 0 conditions that, if not checked, enable the marriage of a properly prepared bad actor, a sufficiently vulnerable and accessible target, and opportunity (attacker readiness plus target availability): the necessary components for a successful terrorist attack. TIs and TAs make decisions that affect relevant Phase 0 conditions. In order to craft courses of action against those decision-making factors, we must meet the requirement of steady-state IO founded on detailed and up-to-date understanding of what, when, where, how, and why TIs and TAs make decisions. This focus on the cognitive component is the nuts and bolts of intelligence support to IO.

As a warfighting organization biased for action, the Marine Corps struggles to fight the self-afflicted pull of establishing the operationalization of IO in the kinetic, near-peer conflict scenario as the only effort worthy of institutional investment. While ongoing geopolitical turbulence with Russia, Iran, China, and North Korea arguably renders this position appealing and defensible, it is nonetheless folly. Revered military leaders and thinkers including Sun Tzu, Clausewitz, Eisenhower, and Mattis understood the criticality of deliberately affecting the cognitive environment to enable shaping of political, military, social, informational, infrastructure, physical terrain, and temporal considerations that drive operations plan and contingency plan conditions prior



**The Marine Corps should invest in a robust liaison officer network.** (Photo by SSgt Melissa Karnath.)

to the onset of hostilities. Particularly, in the current era of ubiquitous virtual communications, intelligence support to IO should be understood as a stylized interpretation of the concepts and fundamentals of marketing. As such, the Marine Corps must rely heavily on purposefully exploiting (read: marketing) any and all activities by personnel and units across the globe to shape Phase 0 conditions in pursuant all operations plans and concept plans associated with any theater or geographic combatant command concerned.

Deliberately working to influence other’s decisions to take certain identified actions or inactions is a historic phenomenon that derives directly from the uniqueness of human consciousness and sentience. This maxim applies equally from one-on-one interpersonal interactions through group dynamics at a population level. MarineNet’s six-module “Marketing Essentials” series is an asset available to Marines of any MOS that provides an introduction to commercial marketing theory and practice. While certainly better than nothing, the module is not contextualized to military information or influence operations, and its applicability to IO or intelligence support to IO may be difficult to glean for many. Any codified Marine Corps curriculum for intelligence support to IO should be heavily

infused with a “marketing for military influence” component. Absent formal material, DCI and the Marine Corps Intelligence, Surveillance, Reconnaissance Enterprise will benefit to research, procure, and promulgate best-practice “band-aid” solutions cobbled together from the most relevant civilian, academic, and commercial resources available.

### **Signature Management: Beyond Camouflage Netting, Emissions Control and Light Discipline**

As Daesh’s physical caliphate collapsed under coalition pressure in the Spring 2019 with its women and children displaced into internally displaced persons (IDP) camps throughout Syria, the global CT community of interest (CoI) began to consider whether and how those IDP camps might contribute or be connected to terrorist activity across the globe. Without robust access to these non-governmental organization run camps, traditional elements of the CT CoI were—rightfully—concerned with understanding key characteristics of the camps and their populations (e.g., nationality demographics, electronic communications device access, internal social structures, affiliation with named terrorist actors). The CTIO community went even further. How are individuals and groups reacting to the phenom-



enon of these post-Daesh caliphate IDP camps, and why? This question drove the development of a universal paradigm for characterizing the IE, comprising three often distinct “signatures” any person, place, thing, idea, or action possesses, defined as follows:

- Physical signature: The unfiltered or un-interpreted *observation* of facts; the ground-truth “who, what, when, where and how” characteristics as they exist.
- Virtual signature: The *representation* of a physical signature as interpreted through various filters of information collection, transmission, and receipt; the “who, what, when, where, how and *why*,” characteristics as they are presented and portrayed.
- Cognitive signature: The individual or collective perception of a virtual signature generated when human factors such as logic, emotion, bias, worldview, prejudice, or predisposition are applied to a sensory input (observation). How individuals and groups construe a virtual signature (what they are thinking or saying regarding who, what, when, where, how, and why characteristics as they are presented in the virtual environment).

Marine Corps IO, like any other IO, fundamentally seeks to exploit the OODA (observe–orient–decide–act) loop of targeted individuals or audiences. (See Figure 1.) To this end, intelligence support to IO should recognize that the cognitive domain is key terrain, and the appropriate cognitive signature is a critical capability. Co-opting Col John Boyd’s OODA loop theory for influence purposes, successful IO manipulates what the target *perceives* (observations) to alter what they believe (orientation) in order to elicit a *decision* that produces a particular action (or inaction). “Observables” (things that can be seen, heard, smelled, touched, or otherwise sensed) are manipulated in the physical domain, changing the target’s understanding within the cognitive domain. In turn, the target adjusts their decision making in the cognitive domain which alters their resultant actions in the physical domain, hopefully in a fashion advantageous to friendly objectives.

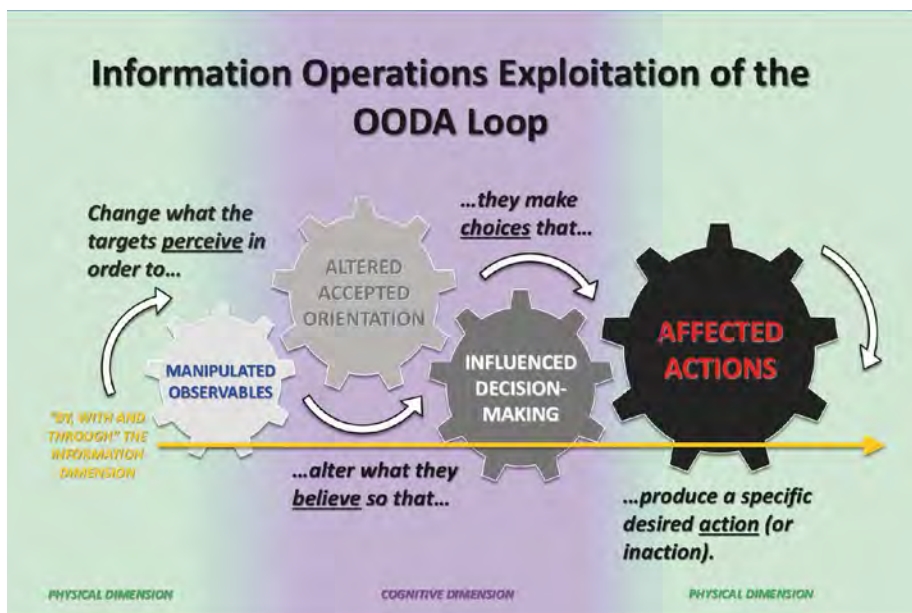


Figure 1. OODA loop. (Image provided by author.)

Though described differently here, this concept of manipulating perceived reality to cause a specific response is not new. Still, understanding that it is not enough to simply identify relevant observables for manipulation is critical for Marine Corps intelligence support to IO going forward. The cognitive may not necessarily be to the physical as three is to one, but the criticality of understanding why and how a target orients against their perceived surroundings, and the factors that drive why and how that target makes decisions based on their orientation cannot be overstated. Admittedly, this is a difficult task, never 100 percent accurate, and often fluid. For intelligence support to IO professionals, a more-than-superficial knowledge of individual and social psychology juxtaposed with individual and group communications science will underpin their input to IO planning that successfully targets relevant signatures while protecting our own.

### The Organizational Imperative for the “Team of Teams”

Given the prolific and very real global threat terrorist organizations continue to pose worldwide, it is no surprise that efforts like this combined, joint, interagency task force found numerous stakeholders contributing their very best personnel to the fight. On-

site representation from double-digit numbers of U.S. intelligence and law enforcement community members, U.S. governmental departments other than the DOD, and representatives from the five eyes (United States, United Kingdom, Canada, Australia, New Zealand) consortium streamlined and optimized analytical output and sharing by orders of magnitude. Similarly, the task force maintained a healthy cadre of liaisons throughout key American and foreign military, government, and academic organizations. More uniquely, the presence of allied and partner country publicly available information and law enforcement personnel—with combined linguistic and cultural expertise covering in excess of 50 languages and regions—was decisive to both intelligence information generation as well as law enforcement and lethal targeting. Nowhere else on the planet, neither within the DOD nor the Department of State, does an assemblage of such diversity in critical skill sets and experience exist. While this heterogeneous team comes with its own challenges in communications, sharing legalities, workspace classification logistics, and national tasking, the benefits far outweigh the inconveniences.

As the Marine Corps progresses in the development of IO and intelligence support to IO, the necessity of strong

connective tissue and touch points both laterally and vertically throughout the joint, multinational, interagency, and interdepartmental (JIIM) IO, CoI, and course of action will only continue to grow. Whether in high-end conflict, low-intensity operations or Phase 0 shaping, the likelihood that the Marine Corps is the single actor or belligerent on the blue side is low. More importantly, the probability that Marine Corps operations in the physical domain across the range of military operations occur in or across the sovereign spaces of one or multiple allied, partnered, neutral, or adversary nations is almost assured. Language and cultural expertise is more important now than ever before, especially regarding IO. Specifically, respective of virtual signatures and their authoritative effect on resulting cognitive signatures and the perceptions and orientations of TAs and TIs, contextualized and resident knowledge of cultural and linguistic nuance can easily be the difference between success and catastrophic failure. Even near-native cultural and linguistic expertise is virtually impossible to artificially reproduce, particularly in adults. Attempting to cross-train Marine Corps intelligence or other IO personnel in niche JIIM functional areas is similarly a non-starter. Most practically, the Corps should invest in a robust liaison network at the intelligence battalions and MIGs, the Marine Corps Information Operations Center, the Marine Corps Intelligence Activity, and the DCI, specifically missioned with focusing on collaboration and sharing to facilitate Marine Corps steady-state (Phase 0) IO activities, and feed operations plan/concept plan development and refinement.

### Thinking Without the Box

Producing and providing information advantageous to exploiting the cognitive domain, the bread and butter of intelligence support to IO, is also poorly understood and often inadequately executed. Because the nature of required intelligence information is often unconventional and non-traditional, it is uncomfortable to consider. This discomfort frequently leads to de-prioritizing or overlooking the requirements

completely, especially when competing with intelligence requirements for kinetic operations or other activity designed solely for the physical domain (a mistake in itself). This reality became apparent as the task force began working the IDP camps problem set mentioned above. The task force was regularly producing or consuming intelligence information reports, tactical interrogation reports, cable reports, and other intelligence information and finished intelligence products, but identification of information that was not indisputably of value to IO was overwhelmingly infrequent or entirely absent.

The intelligence professionals comprising the task force were incredibly competent “inside the box,” and even “outside the box.” However, they were relatively unfamiliar with IO and not

standoff from an adversary or increase an adversary’s vulnerability to other combined arms effects. Under this construct, intelligence collection (and subsequent analysis and production) provides critical planning information for operations: the traditional “intelligence drives operations” paradigm. In the vein of “no box” thinking, however, the task force conceived initial ideas for employing IO in support of intelligence operations, specifically intelligence collection against targets for whom conventional collection assets had insufficient placement or access. For the task force, that was consideration of employing niche IRCs with the ability to gain entrance to the camps to conduct actions that produced or elicited feedback that responded to some of the task force’s outstanding intelligence re-

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habituated to analyzing or producing intelligence with an opportunistic eye for influence potential or leveraging other opportunities. A leveling brief on IO definitions, objectives, processes, and intelligence requirements significantly increased collective understanding of information and intelligence of influence value, but sustaining the sensitization will require frequent periodic re-education. For a nascent concept and capability like intelligence support to IO, unnecessary constraints and restraints are anathema to progress. Thus, intelligence professionals supporting IO need to embrace that outside of applicable policy and legal bounds (which should also be debated, where warranted) for collection, analysis, assessment, and production of “influence intelligence.” *There is no box* (yet).

Traditionally, IO is considered and planned for as fires in support of “finishing effects.” IO is most often employed to either increase blue forces’

requirements. Special operations forces do not hold a monopoly on innovative use of IO, and the Marine Corps, owning a range of organic IRCs, should stimulate and encourage conceptualization and experimentation that pushes the advancement envelope.

Likewise, a paradigm shift might be necessary regarding intelligence products and influence-specific analysis, assessment, and information. Many tradecraft concepts in tactical and strategic intelligence community doctrine have persisted—largely unchanged—for decades, their successful employment having stood the test of time. However, American military acceptance of the IE, and the virtual and cognitive domains and signatures that define it, requires a reassessment and eventual expansion of the intelligence industry standard concepts and lexicon to adequately meet the current and future needs of intelligence support to IO as it grows into its own. By way of example, the following defini-



tions of a few core intelligence concepts adapted for the influence construct are offered:

- Influence named area of interest: A physical or virtual area of interest in which activity can confirm/deny the relevance and relative importance of ASCOPE (areas, structures, capabilities, organizations, people, events) factors to TA/TI decision making.
- Influence target area of interest: A physical or virtual area of interest in which factors are present that, if successfully engaged, could cause a TA or TI to take decisive actions or display behaviors favorable to desired influence goals or objectives.
- Influence priority intelligence requirements: Who, what, when, where, why, and how questions related to behavior or decision-making factors that will critically affect influence operations planning or execution.
- Development, standardization, and professionalization of influence-specific intelligence products should be approached in the same manner. Examples might include:
  - FLASHREP: Rapid dissemination analytic product that alerts the influence community of interest to a phenomenon in the IE with a reasonable potential to directly or indirectly impact Marine Corps or other theater equities.
  - Notice of influence potential: A rapid response and dissemination analytic product that alerts the IO CoI to a phenomenon in the IE that could be exploited in support of influence goals or objectives.
  - Influence factor analytic report: A deliberate analytic product of synthesized multi-source data that provides a contextualized assessment of the relative impact of an influence variable in the IE, as well as opportunity analysis for its exploitation or mitigation.
  - Intelligence information report/intelligence cable addendum postscript to serialized reporting that provides analytic commentary from an influence perspective on the intelligence information presented.

Codifying and standardizing influence-related intelligence products will



**Marines and partner nations must identify and receive updated intelligence that impacts operational decision making.** (Photo by SSgt Jordan Gilbert.)

inevitably drive efficiency by systematizing and optimizing the information for reliability, utility, and sharing. Here again, special operations forces are not the arbiters of innovation, whether in the IC or IO CoI. The Marine Corps, through the ICCs and MEF information groups, is well-postured to wade forward in the introduction and development of influence-specific intelligence products and procedures; the Corps' global presence through MEUs afloat, shore-based crisis response special purpose MAGTFs, and worldwide theater security cooperation activities are viable vehicles for concept development and evaluation against real-world problem sets and targets.

### The Information Environment and the Unblinking Eye

Lastly, although the sum of JIIM personnel within the task force represented a considerable and unique intelligence analysis and production capability, their overall effectiveness with respect to IO was much less than it otherwise could have been owing to the absence of a shared, graphically visualized, real-time, and persistent understanding of the IE. The task force lacked a combined operations and intelligence picture of the IE. As a result, friendly IE activities (deliberate or unintentional) across the transregional CTIO operational area of

operations were not tracked for even rudimentary effects and causation correlation assessment. Adversary IE actions and general IE baseline activities were only nominally followed. This deficit was due in part to a lack of personnel for the tasks, but largely because of the unavailability of systems and software necessary to satisfactorily access, monitor, search, and interact with the unclassified, open source IE.

Although the volume of data present and available with and through the World Wide Web today seems infinite, access to much of that data—even data that is non-proprietary—comes with an ever-increasing price tag, and often with specific hardware and software requirements to gain access (also at a cost). Unfortunately, it is exactly data that, if appropriately managed, can enable:

- Target individual and target audience development.
- Threat network illumination.
- Threat tactics, techniques and procedures discovery and tracking.
- Indications and warning within the IE.
- Influence opportunity identification and IO planning.
- IO assessment.

Equally, unclassified information and data must be available in a usable format and timely manner on analytic and production systems of higher classifications

to facilitate enrichment and fusion with classified data. The unclassified information space is the principle battlespace and workspace for IO, and a primary area for collection of information of influence-intelligence value. For at least a quarter century, the IC has struggled to effectively consolidate information and analytic systems within single classification levels (such as the Secret Internet Protocol Router Network), and there is no reason to believe that issue would be solved in the intelligence support to IO arena. However, experiences at the task force indicate that, with some effort, the Marine Corps could successfully bring together applications like command and control of the information environment, Palantir, and the Conflict Zone Took Kit to make possible the geographic and temporal display (and subsequent analysis) of both persistent and target-searched news and social media big data; additionally, anonymized surface, deep and dark web crawling is promising.

**Parting Shot: Gotta Give Some to Get Some**

The observations and recommendations presented above are those of one individual and are neither represent nor endorsed by the Marine Corps or the DOD. These observations and recommendations may turn out to be inconsequential or impractical when truly placed against the particularities of Marine Corps IO and intelligence support to IO development, and the value of the article may subsequently reflect that futility. The singular takeaway that should be incontrovertible, however, is that only experience can drive progress. Progress is possible only through opportunity. The occasions for Marine Corps intelligence practitioners to exercise intelligence in support of IO in forward deployed environments dealing with real-world problem sets and threats are exceedingly few. While many of the billets exist inside joint commands over which the Marine

Corps has no direct say or influence, that fact should not be a deterrent. Rank agnostic, any solid Marine Corps intelligence professional assigned to a billet or deployment outside the Corps will step out smartly on tasking to deliver routine and relevant lessons learned and after-action reports to HQMC Intelligence Department, DCI, MCIOC, and any other stakeholders identified as such. Better yet would be that the Marine Corps prioritizes these billets and ensures the absolute best we have to offer are assigned to these challenging positions, supported throughout, and intelligently retained and employed in follow-on assignments that will make good use of their experiences and skill sets. Anything short of this, and we squander the opportunity to forge and hone the Marine Corps' IO blade—and the intelligence that wields it—at our own risk.



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