

The Intelligence Planner's Guide

Improving intelligence support to operational planning teams
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Operational planning teams (OPTs) formed at the MEF, MEB, and major subordinate command levels are led by MAGTF planners holding the 0505 MOS. These officers earn a master's degree primarily from the Marine Corps' School of Advanced Warfighting, the Navy's Maritime Advanced Warfighting School, or the Army's School of Advanced Military Studies; through this experience they receive a graduate-level education in planning. The same cannot be said of many officers assigned by assistant chiefs of staff for intelligence (AC/S G-2) to participate in and support OPTs. At best, intelligence planners are field-grade officers who have completed resident or non-resident Command and Staff College. At worst, the OPT is supported by com-

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pany-grade officers who have completed resident or non-resident Expeditionary Warfare School but have little or no practical experience planning or operating at the MEF and MEB command element levels. This situation creates an imbalance in expectations and performance between the OPT leader and the intelligence officer assigned to the OPT. This can result in planning inefficiencies detrimental to the development of a detailed operations order.

Because of the importance of intelligence throughout the Marine Corps

Planning Process, this article focuses on the techniques, procedures, trends, and pitfalls associated with the integration of intelligence into the overall planning effort. Based on the MAGTF Staff Training Program's *Intelligence Planner's Guide (MSTP Pamphlet 2-0.2*, February 2017), this article also identifies the specific roles and responsibilities of intelligence planners and highlights the OPT leader's expectations.

For intelligence officers, the planning process begins not only with *intelligence preparation of the battlespace (IPB)* but with the preparation of the planning space first. Too frequently, MSTP has observed OPTs wherein the planning spaces were devoid of maps and intelligence preparation of the battlespace products on the first day of planning. As the OPT leader and other planners occupied the OPT room, there were no products from which to build situational awareness or conduct initial briefings. As a result, the OPTs lost time and momentum as the intelligence planner reached back to the MAGTF Intelligence Center for relevant maps and IPB products. Success or failure in the ability to prepare the battlespace is related to another MSTP concept: *the intelligence planner's dilemma*. While a standing OPT oriented on an existing operation plan will generally have a library of finished IPB products from which to draw, this is not necessarily the case in an emerging crisis or no-notice contingency. In these instances, the intelligence planner must still deliver any available IPB products in order to "prime the planning pump." He must anticipate the demand and use his initiative to populate the planning spaces before the OPT leader defines specific requirements.



Task organization and tasks for the intelligence cell will take place during COA development and are refined based on wargame reviews. (Photo by LCpl Juan Bustos.)

A footnote to preparing the planning space is the identification of proper scale maps and the methods used to display them. MSTP has often observed MEF- and MEB-level OPTs using maps too small in scale (meaning the representative fraction is relatively small) to conduct detailed planning. Plotting adversary battalion and brigade icons on a 1:500,000 scale map or smaller leads to false impressions and insufficient detail regarding the impact of terrain. While a MEF is the largest warfighting organization in the Marine Corps, it still operates at the tactical level of war. In order to obtain sufficient detail to support course of action development, larger scale maps such as 1:250,000 joint operations graphics and 1:50,000 or 1:100,000 topographic line maps are required. Hard-copy maps should be prominently displayed for easy access. Additionally, electronic maps using software such as command and control personal computers should be used to complement hard-copy maps. In fact, these electronic maps allow for more precise plotting of units and control measures during planning and provides a further detailed representation of known or template adversary positions. This also facilitates the transition from conceptual to detailed planning and the capture of minutiae on overlay files to support orders development. The most effective OPTs employ a combination of appropriate scale hard-copy and electronic maps, particularly during course of action development and wargaming.

After anticipating requirements and adequately preparing the planning space, the intelligence planner is ready to participate in the OPT's activities. But he does not do this alone. *Intelligence planning is a team sport.* The intelligence planner is the AC/S G-2's direct representative on the OPT and provides an initial intelligence staff estimate based on the G-2's appreciation of the situation, to include initial guidance regarding priority intelligence requirements and the adversary's center of gravity, critical vulnerabilities, and potential courses of action. To be sure, the OPT will refine these throughout the planning process, but the AC/S G-2 must provide guidance to the intelli-

gence planner before the commencement of planning.

The AC/S G-2 also ensures that the intelligence planner receives dedicated support, be it from a multifunctional direct support team assigned to the OPT or from the entire MAGTF Intelligence Center. In either case, these entities will provide initial and continuously updated IPB products to the OPT based on the requirements identified by the intelligence planner through his in-

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teraction with the OPT. The key point is that the intelligence planner does not have the time to "do" IPB while he is engaged in the planning process. The intelligence planner is also assisted by subject-matter experts (SMEs) from across the MAGTF's intelligence enterprise. Principal among these SMEs are the G-2's collection manager and target intelligence officer. These officers are instrumental in ensuring organic collection assets as well as theater and national resources are optimized to support a selected course of action and that MAGTF fires planners receive relevant information to inform decisions regarding what to target and what not to target.

Other SMEs, representing MAGTF-level collection capabilities from the force reconnaissance company, unmanned aerial vehicle squadron, intelligence battalion, and radio battalion, must also be present at the OPT or on call to answer requests for information. These SMEs provide capability and limitation inputs to the intelligence staff estimate and offer employment recommendations during course of action development and wargaming. The contributions of these SMEs are essential; without them, the intelligence planner would be writing checks during course of action development that the units would have to cash during orders de-

velopment and mission execution. The potential exists that absent these SMEs, the selected course of action would not be feasible, acceptable, supportable, distinguishable, or complete from the perspective of the intelligence warfighting function. Too often, the intelligence planner is "alone and unafraid" as the OPT conducts the planning process.

As the process continues, the intelligence planner will participate in the *identification of specified, implied, and essential tasks.* While essential tasks will rarely include intelligence-related tasks, the intelligence planner will identify many implied intelligence tasks that support specified and essential tasks. He must then begin to organize these tasks for assignment to the appropriate major subordinate command, intelligence unit, or subsection within the G-2. These tasks will be refined during course of action development and wargaming for eventual inclusion in the Annex B and its associated appendices during orders development. However, it is important to begin capturing and refining these tasks during problem framing. A critical aspect regarding the assignment of tasks to intelligence units, in particular, is the *identification of the correct command and support relationships.* For example, collection teams organic to the intelligence and radio battalions are often assigned a specific command or support relationship with maneuver units as far down as the battalion (and now even the company) level. Getting these relationships "right" and ensuring a common understanding of what is meant by general support, direct support, or attached is often lacking. *Army Doctrine Reference Publication (ADRP) 5-0, The Operations Process* (May 2012), provides excellent matrices that define the full range of command and support relationships available for consideration.

An important result of task identification is task organization. Depending on the desired command and support relationships determined during course of action development, elements of intelligence units will be task organized under various subordinate headquarters and maneuver units. While the tasks will be captured primarily in the Annex

B, the task organization will be reflected in the Annex A. In order to ensure accountability and proper employment, the intelligence planner must verify that high-demand, low-density assets such as counterintelligence/human-intelligence detachments and signals intelligence support teams are reflected in the Annex A with the correct command and support relationships identified, as prescribed in *MCWP 5-10, The Marine Corps Planning Process* (Washington, DC: HQMC, May 2016). Intelligence planners must coordinate with other planners to ensure greater fidelity in the Annex A than has typically been observed by MSTP during recent exercises.

The initial task organization of, and tasks assigned to, intelligence units will take place during course of action development and will be refined based on the results of the war game. During course of action development and wargaming, however, a form of “staff schizophrenia” exists because *the intelligence planner has two roles to play*. First, he contributes to friendly course of action development by generating tailored concepts of intelligence support based on the intelligence staff estimate. Concepts of intelligence support summarize the means available to direct, collect, process, exploit, analyze, and disseminate intelligence. They also describe how assets will be allocated across the MAGTF and provide a functional level of detail necessary for a complete friendly course of action. To accomplish this, the intelligence planner leverages the SMEs discussed previously to understand how available assets can best support the courses of action under development. While the focus is generally on collection assets, the intelligence planner must also consider the intelligence analysis, production, and dissemination resources available to the MAGTF and how they can be task organized to better support the major subordinate commands.

Second, the intelligence planner must develop adversary courses of action based on IPB inputs from the G-2 section or a dedicated red cell (if one is established). Adversary courses of action must be developed to the same level of detail as friendly courses of action, to

include tasks and purposes for the designated main effort, supporting efforts, and reserve. Adversary courses of action must be graphically displayed on a map with the appropriate symbols and task graphics along with close, deep, and rear areas with associated boundaries and control measures. Furthermore, each course of action must be accompanied by a detailed narrative that discusses the main and supporting efforts and the reserve, as well as the adversary’s concept for decisive, supporting, and sustaining actions. The narrative and graphics should also address adversary decision points and triggers associated with each course of action. The intelligence planner must also highlight the adversary’s ability to collect intelligence on friendly forces and to sense (and make sense of) friendly deception efforts. Unfortunately, MSTP has observed that adversary courses of action generally lack sufficient detail compared to friendly courses of action, consisting of merely a brief narrative and “big red arrow” graphics. This makes for a lopsided war game and deprives the rest of the OPT the opportunity to test

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friendly courses of action against a sufficiently detailed and realistic threat.

Once friendly courses of action have been wargamed against detailed adversary courses of action, the results are analyzed and presented to the commander. The commander then selects a course of action, and the OPT turns to orders development. Up to this point, the intelligence planner and the designated SMEs have done most of the heavy lifting for the G-2. Now, the deputy AC/S G-2 assigns other SMEs within the G-2 to draft portions of the Annex B and its associated appendices. The intelligence staff’s estimate and the concept of intelligence support developed by the

intelligence planner serve as the base documents for this effort. The intelligence planner’s job, however, is not done. *A common pitfall is tunnel vision on the Annex B*. During orders comparison and crosswalk, the intelligence planner must review other relevant annexes and appendices in order to ensure agreement with the Annex B. For example, he must review the Annex W (Aviation Operations) to ensure that any discussion of unmanned aerial system operations in that annex is consistent with the collection plan as outlined in Appendix 13 to Annex B. Failure to do so could result in a disjointed or contradictory order. *MSTP Pamphlet 2-0.2* provides a baseline listing of the other annexes and appendices the intelligence planner must review in order to ensure consistency with the Annex B.

While much of this content may seem obvious to experienced planners and intelligence officers, MSTP has seen these errors and oversights consistently repeated during several MEF and MEB exercises conducted between 2015 and 2017. *MSTP Pamphlet 2-0.2* also includes detailed topics such as the development of priority intelligence requirements, the conduct of relative combat power assessments, and center of gravity analysis. Through awareness and anticipation of these trends and pitfalls, intelligence officers assigned to OPTs can improve intelligence support to the planning process and enhance the Marine Corps Intelligence, Surveillance, and Reconnaissance Enterprise’s ability to support commanders and staffs. The intelligence planner’s significant responsibilities often fall on the shoulders of relatively junior company- and field-grade officers lacking MAGTF-level experience and the graduate-level planning background held by most OPT leaders. This article and *MSTP Pamphlet 2-0.2* are intended to level the playing field and prepare these officers to serve as intelligence planners on OPTs.

