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Defining the Planning Conference Structure of Administrative Design Process

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JCSP 49

Service Paper

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Defining the Planning Conference Structure of Administrative Design Process

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DEFINING THE PLANNING CONFERENCE STRUCTURE OF ADMINISTRATIVE DESIGN PROCESS

AIM

1. In the absence of approved Canadian doctrine, the aim of this paper is to present proposed best practice for the Planning Conference Structure administrative planning process defined by initial (IPC, main (MPC and final (FPC planning conferences.

INTRODUCTION

2. The Planning Conference Structure has seemingly emerged as the dominant method for North American and European militaries to plan complex administrative activities. The tell-tale indicators of this structure in-action are the convening of IPCs, MPCs and FPCs as decisive points in the process. It is the preferred method of planning of exercises, deployments and program implementation. This structure has become so ingrained that nearly all administrative activity within the Canadian military is organized by these milestones and the same sign posts appear frequently as guiderails to NATO's annual, bi-annual and quadrennial exercise planning. However, following a summary review of NATO, Canadian and US doctrine, this structure appears to have emerged organically and remains formally undefined¹. As such, although all allied partners understand generally what is meant when one of these conferences is convened, best practices for inputs and outputs remain absent. Without deliberate organizer-guidance, this presents space for conference participants to arrive unprepared for key planning events.

3. This service paper intends to propose a best practice for a Canadian approach to the Planning Conference Structure. This will be achieved by linking the Structure to existing Canadian doctrine and incorporating lessons learned from examples of its recent use. It will conclude with a proposal of best practices explained in the context of exercise planning that can be extrapolated to other administrative planning activities.

DISCUSSION

4. Doctrinal Linkages. The principal design processes presented in Canadian doctrine are the Steps of Battle Procedure, the Estimate and the Operational Planning Process (OPP). They are primarily designed to plan tactical and operational manoeuvre. Although functional, they are not tailored for administrative planning. While portions of each address administrative consideration and processes, others present distraction and friction. A summary of the strengths and weaknesses of each with regards to administrative planning is as follows:

- a. Steps of Battle Procedure. Summarized in Annex A, the Steps of Battle Procedure outline the logical sequence to planning the execution of a task². All steps are applicable to exercise and deployment planning, but steps eight and nine concerning reconnaissance are not easily applicable to a program implementation. What is most critically absent from the design model is space for collaboration amongst stakeholders. It is perhaps implied in steps pertaining to outline planning and reconnaissance, but with collaboration being key to administrative planning, one would assume a greater emphasis to establish synchronization opportunities at decisive points of the process.

¹ The bibliography represents the references reviewed to confirm the absence of doctrinal guidance for the Planning Conference Structure amongst NATO, US and Canadian Doctrine.

² Although found throughout CAF Doctrine, the reference used for this paper was Decision-Making and Planning at the Tactical Level, Chapter 2

- b. The Estimate. Summarized in Annex B, the Estimate is the design method primarily used in the CAF at the tactical level³. Steps one, three and four pertaining to mission analysis, option development and plan refinement are relevant to administrative planning, but the factors appreciation defined in step two is only partially relevant to administrative planning. For exercise planning, weather, terrain, friendly forces and time/space might be valuable considerations. Enemy and security might also be considerations for deployment force protection measures, but most certainly none of these factors would pertain to a program implementation. As well, collaboration is implied, but not prompted in this process. As such, it is inclined to encourage stovepipe planning.
- c. The OPP. Summarized in Annex C, OPP is the design method primarily used in the CAF at the high tactical and operational level⁴. It is designed to manage the complexity that comes with large scope activities and establishes opportunities for collaboration throughout its process. The most prominent collaboration points include the briefings of Orientation, Mission Analysis, Information, Course of Action Selection and Final Plan. However, input/outputs of these briefs are highly tactical in nature. As such, although the naming convention of these briefs may appear in the administrative planning of the CAF's level 1 and 2 headquarters, the content of these briefs diverge from doctrinal guidance. As well, in level 3 and 4 headquarters possessing of only dozens of staff, it becomes too collaborative with its various steps acting more as speed bumps than enablers.

5. Conference Planning Structure in Practice. Although examples abound, it is useful to review a case studies to illustrate how CAF organizations have organically adopted the Planning Conference Structure as model for designing activities.

- a. Background. The First Battalion Princess Patricia's Canadian Light Infantry (1 PPCLI) Ex PATRICIA STRIKE was a classic infantry battalion fall field exercise conducted 09-22 Nov 20. In accordance with Fiscal Year 2020/2021 (FY20/21) Canadian Army Operational Plan that cascaded through 3rd Canadian Division and 1 Canadian Mechanized Brigade Group to 1 PPCLI, the Battalion was directed to validate itself at Collective Training Battle Task Standard Level 3 Live and Level 4 Dry by the end of 2020⁵. This equated to live fire manoeuvre at the platoon (pl) level and dry at the company (coy). As part of the creation process for its own annual operational plan, the 1 PPCLI HQ completed the initial stages of the estimate and battle procedure to isolate a time in the fall to conduct this training. This was based off mission analysis layered upon a factors' estimate focused on weather, training area availability, and friendly forces. However, as is common with exercises of this nature, given that the training would be conducted at the pl and coy level, it was deduced that control and support of the exercise would be best centralized at the unit level, but have execution decentralized to the coys. This decentralization would necessitate the use of the Planning Conference Structure to design the exercise⁶.
- b. Planning Guidance and IPC. With the FY20/21 Unit Operational Plan acting as Commanders Planning Guidance, an Initial Warning Order was published upon the

³ Chapter, Chapter 3

⁴ The Canadian Forces Operational Planning Process (OPP) Change 2, Chapter 3

⁵ FY20/21 1 PPCLI L4 Operation Plan

⁶ LCol Schaub, Commander's Planning Guidance – Ex PATRICIA STRIKE

conclusion of the annual posting season at the end of August⁷. The core of it explained the objectives, dates, locations and key coy tasks of the exercise. Most importantly it directed the convening of initial, main and final planning conferences to structure the plan's development. The first of these occurred within days of the document's publication. In the interim period, coys conducted their mission analysis and sketched outline and reconnaissance plans. As such, the IPC consisted of a review of the Initial Warning Order with amplification on intents followed by a discussion on task distribution and reconnaissance plans. Through these discussions, best efficiencies were found and coys were enabled to conduct productive reconnaissance of the training location. A Supplemental Warning Order was published subsequently to codify changes to the outline plan that emerged from the IPC, as well as provide necessary guidance with regards to reconnaissance execution⁸.

- c. Interim Planning. Possessing all required guidance, coys departed the IPC enabled to conduct their own Planning Conference Structured Exercise Design. Coy HQs distributed their own planning guidance through initial warning orders and an IPC to their pls. This guidance included similar details to the unit warning order, but tailored to the coy level. For example, where a coy may have identified that they would have to refresh its members on the individual battle task standards of particular weapons systems to allow them to participate in the ascending levels of collective training, the task of running various weapons ranges were distributed to pls to execute. As well, a coy MPC was established at a date that would proceed the unit MPC by some days. This enabled coy HQs to consolidate relevant pl inputs to populate the coy input that would be required at the unit MPC. In the interim period, various pl and coy reconnaissance parties were dispatched to enable outline planning and inform the next round of conferences.
- d. MPC. Some 8 weeks later at the end of Oct, a unit MPC was convened. Now informed by outline plans substantiated by reconnaissance and coy level MPCs, this meeting consisted of round table cross-briefings by the coys on their proposed schemes of manoeuvre. In preparation for the meeting, the coys had submitted their ground traces to the unit operations cell for layering and identification of conflicts. As such, a large part of this conference was negotiating these conflicts, which predominantly concerned terrain allocations. At the end of the conference, with all stakeholders' concerns having been addressed, the unit HQ approved the plan and codified it with the publication of an Order⁹.
- e. Coordination and Preparation and FPC. Shortly after the receipt of the unit order, coys published their own coy orders codifying their own plans. This initiated the iterations of support activities required to prepare the unit for deployment. Key to this was the publication of a deployment annex to the unit order, which required rolling collaboration between the coys' logisticians. Finally, as preparations ended and the deployment date for the exercise neared, a unit FPC was convened to complete a final confirmation that the unit was prepared to deploy. At this meeting the unit confirmed to the coys that all their out-of-unit resource requests had been supported and the coys confirmed to the unit their coy resources were prepared to support the exercise. The meeting concluded with a brief review of the deployment plan and the group departed prepared for their

⁷ Warning Order – Ex PATRICIA STRIKE

⁸ 1 PPCLI Ex PATRICIA STRIKE Post Exercise Report

⁹ 1 PPCLI Exercise Order - Ex PATRICIA STRIKE

decentralized execution of the training. The outtakes of the meeting were all categorized in a Frag O¹⁰. Subsequent FPCs were conducted at the coy level to achieve similar results with pls. The end result was that all soldiers within 600-member unit were prepared and enabled to deploy and achieve the training¹¹.

- f. Doctrinal Alternative. Hypothetically, had 1 PPCLI not used the Planning Conference Structure to design their exercise, opportunities for resource frictions between coys would have emerged. These frictions would have had to been identified and solved exclusively at the unit level. However, this would likely only have occurred after several cycles of bi-lateral negotiations between unit staff and coys. The time taken to achieve this would likely have resulted in redundant planning as subordinate organizations worked in isolation in the interim. As well, it would have created additional staff burden upon the unit headquarters that was otherwise mitigated by the multi-lateral conferences¹².
- g. Extrapolation to Other Administrative Activities. The 1 PPCLI field exercise example can be extrapolated to designing other administrative activities such as deployments and program implementation. For example, Canada's contribution to the enhanced Forward Presence Battle Group in Latvia in 2017 followed a similar model with the various products, planning conferences and reconnaissance descending down from the Strategic Joint Staff through the Canadian Joint Operations Command and Canadian Army to the Force Generating Division, Brigade and Unit. Given that the Battle Group was multinational, this was critical, because similar cascades were occurring across all sending nations. Without unifying planning conferences, it would have been exceptionally difficult to synchronize the simultaneous deployment of military elements from their originating countries.

6. Best Practices. Annex D illustrates a proposed best practice of the Planning Conference Structure in terms of sequence and layering across cascading organizations¹³. It presents likely inputs and outputs of the various conferences and products within the structure. It also suggests how the sequence might measure against existing doctrinal design models such as the Steps Battle Procedure and OPP. Some salient points of consideration are as follows:

a. Sequence:

- (1) Commanders Planning Guidance (CPG) and Initial Warning Order. The design process starts with the Commander and their executive staff completing the initial stages of the estimate process to include a mission analysis, time estimate and factors analysis drawing upon best available information. The outputs of this effort should be compiled in some form of initiating direction of which an Initial Warning Order structure provides a productive default. Contained within the

¹⁰ Frag O to 1 PPCLI Exercise Order - Ex PATRICIA STRIKE

¹¹ 1 PPCLI Ex PATRICIA STRIKE Post Exercise Report

¹² This is a summary of the planning events that occurred between Sep 16 and Jun 17 from the perspective of the author who was at the time the operations officer the force generating unit and later a senior officer within the first rotation of the enhanced Forward Presence Battlegroup

¹³ The following best practices are synthesized through the authors extensive experience planning exercise within the Canadian Army and having broad experience planning NATO multinational exercises within Multinational Corps Northeast AOR 2017-2018. Their principals are founded in the doctrinal references presented earlier in the paper and exemplified in the example 1 PPCLI Ex PATRICIA STRIKE case study.

direction should be the outline plan, preliminary tasks and the production schedule to include the rough conference dates;

- (2) IPC and Supplementary Warning Order. Upon receipt of initiating direction, subordinate and flanking stakeholders will complete their own analysis to determine their interests and concerns. Armed with these, all parties will assemble at the IPC to review the initiating direction and address concerns. Normally, this will include discussion to address concerns and identify efficiencies. These inputs will likely prompt modifications to the outline plan which will be codified in a follow-up document of which a Supplemental Warning Order structure provides a productive default;
 - (3) Reconnaissance and Outline Plan. With outline plan negotiations complete, conditions are set for productive reconnaissance at all levels of stakeholders. Reconnaissance usually refers to on-ground study of the problem in order to contribute to planning, but could equally be attributed to any form of research. For example, program implementations may not may not require terrain visits. However, they likely will require research, surveys and study. As such, this should more be considered as an information gathering stage. Once sufficient information has been collected, plans can migrate from outlines to concepts of operation;
 - (4) MPC and Orders. An MPC is the ideal place to mesh plans together. In preparation for the conference, efficiencies can be achieved by subordinate and contributing stakeholders submitting their concepts of operation to their convening headquarters for layering. This will help to identify frictions for discussion at the conference. At the conference itself, all stakeholders should present their portion of the plans and identify concerns. Subsequently, round table discussions can occur to deconflict frictions and find solutions for gaps. The end result should be a coherent plan that sufficiently supports all stakeholders' interests. This can subsequently be codified in formal direction for the activity. Doctrinal examples include orders and instructions; and
 - (5) FPC and Fragmentary Orders (Frag O). Upon receipt of orders, stakeholders will depart for a period of final coordination and preparation prior to the commencement of the activity. An FPC is a valuable final step in the process to offer one last opportunity to unify efforts prior to initiating the activity. The nature of this conference is for all stakeholders to advise the group on the progress of their preparations and raise concerns for mitigation by the group. Where mitigations cannot be found, plans can be adapted to accommodate. These mitigations and accommodations will be codified in a Frag O.
- b. Cascading. The important characteristic to note in the Planning Conference Structure is that it accommodates the interests of hierarchical stakeholders. This is to say that the aforementioned sequence will be playing out at all levels of the hierarchy at staggered intervals. Experienced practitioners of this process will debate which side of the hierarchical sequence the MPC will fall. For example, should subordinates brief up or superiors brief down. The most common is the former, which is illustrated in Annex D. This is because it offers the best opportunity for stakeholders closest to the problem to present ground truths sufficiently early to contribute to a plan. The alternative is more

dictatorial and requires a heavier emphasis on Frag Os to address previously unidentified challenges that emerge during the preparation process. The result is something closer to the Steps of Battle Procedure that is more insular in its structure.

CONCLUSION

7. Appreciating its prevalence without doctrinal definition, this service paper intended to propose a best practice for a Canadian approach to the Planning Conference Structure. This was attempted by layering these practices within existing doctrine and reviewing an example of its recent use. It concluded by offering some definition and explanation for its structure to include an illustrate of its process in action.

RECOMMENDATION

8. It is recommended that CADTC consider formalizing the Planning Conference Structure as an administrative activity design process and relay it to its flanking elemental doctrinal establishments for implementation. In so doing, a common understanding of input, outputs and sequencing can be enabled amongst all CAF stakeholders. This will offer greater efficiency within joint administrative planning.

Annexes: A. Steps of Battle Procedure

B. The Estimate

C. The Operational Planning Process

D. The Planning Conference Structure Illustrated

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16 STEPS OF BATTLE PROCEDURE

1. The 16 Steps of Battle Procedure are described in several CAF Doctrinal Publications. Some of the most prominent include Command in Land Operations, The Infantry Battalion, the Combat Team Commander's Handbook and the Infantry Platoon and Section in Battle. Depending on the age of the publication, they are listed as 15 steps, but in more recent publications some steps have been broken out to be 18 Steps. In common nomenclature, they are referred to the Steps of Battle Procedure.

- a. Step 1 - Receive Warning Order;
- b. Step 2 - Quick Map Study and Time Estimate;
- c. Step 3 - Receive Orders;
- d. Step 4 - Conduct Mission Analysis;
- e. Step 5 - Issue Initial Warning Order;
- f. Step 6 - Detailed Time Estimate;
- g. Step 7 - Detailed Map Study and Outline Plan;
- h. Step 8 - Prepare Reconnaissance;
- i. Step 9 - Conduct Reconnaissance;
- j. Step 10 - Complete Plan;
- k. Step 11 - Issue Supplemental Warning Order;
- l. Step 12 - Prepare and Issue Orders;
- m. Step 13 - Coordinate and Supervise Preparations;
- n. Step 14 - Supervise Deployment;
- o. Step 15 - Execution; and
- p. Step 16 - Collect Lessons Learned.

THE ESTIMATE

1. The Estimate is described in several CAF Doctrinal Publications. Some of the most prominent include the Operational Planning Process, Command in Land Operations and Staff Duties in Land Operations. The following aide memoire comes from Command in Land Operations.

Receiving a task/mission, or deriving one from an ongoing operation, initiates the estimate.		
STEP 1 – MISSION ANALYSIS		
Question/factor	Consideration/deduction	Tasks/constraints
(a)	(b)	(c)
Superior Commander's: a. Intent, two levels up b. Intent and concept of operations, one level up My role in his plan	How must my action directly support my immediate superior, taking into account his intent and concept of operations, and the intent two levels up?	
Tasks: A. assigned B. implied	What tasks must i complete?	
Constraints: a. Time, including fixed timings b. Space c. Resources d. ROE	What limitations are there on my freedom of action? By when do I need to decide?	
Changes to situation	Has the situation changed enough to warrant an adjustment decision?	Adjustment decisions are those that are made to respond to an unforeseen threat or to exploit a friendly opportunity. Adjustment decisions reallocate resources, change the concept of operations, or change the mission.
Commander's direction	What has to be decided? Who is to check what, if I am not going to complete this estimate totally myself? How long will it take to complete the estimate and prepare orders	Commander: Seeks clarification up, as required Identifies CCIR Completes commander's planning guidance

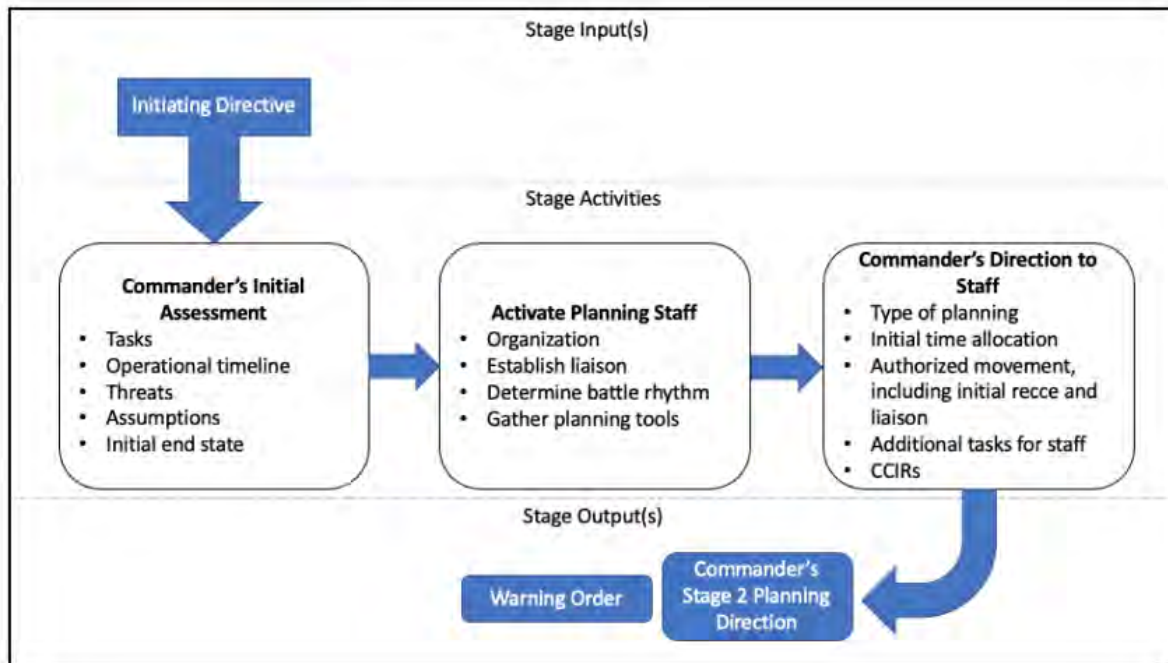
Issue initial warning order (wng O)		
STEP 2 – EVALUATE FACTORS		
Question/factor	Consideration/deduction	Tasks/constraints
(a)	(b)	(c)
Environment (Ground): <ul style="list-style-type: none"> a. Battlespace evaluation: <ul style="list-style-type: none"> (1) Terrain, general (overlay) (2) Vital ground/key terrain (3) Boundaries (4) Left (5) Centre (6) Right b. Approaches (including impact of expected weather): <ul style="list-style-type: none"> (1) Own: <ul style="list-style-type: none"> (a) Going/routes (b) Obstacles (c) Dominating ground (d) Distance (e) Enemy perception (2) Enemy: <ul style="list-style-type: none"> (a) Going/routes (b) Obstacles (c) Dominating ground (d) Distance c. Weather (weather effects matrix/light data table): <ul style="list-style-type: none"> (1) ISTAR implications (2) Air/aviation implications 		
Enemy: <ul style="list-style-type: none"> a. Threat evaluation (doctrinal overlays) <ul style="list-style-type: none"> (1) Organization (2) Equipment (3) Support services (4) Tactical doctrine 		

Enemy (cont.): b. Threat integration (1) Aims and Intentions (2) Dispositions (3) Strengths and weaknesses (4) Enemy courses of action (overlay)		
Friendly Forces: a. Air b. Maritime c. Flanking units/ formations d. Own forces capability: (1) Organization and equipment (2) Dispositions/ availability (3) Restrictions on employment (4) Strengths and weaknesses e. Support services (CSS): (1) Distance (2) Demand (3) Duration (4) Destination f. Relative strengths		
Surprise and Security: a. Surprise b. Security c. OPSEC and protection		
Time and Space: a. Fixed timings b. Enemy timings c. Own timings d. Time and space constraints		
Other Relevant Factors:		
Summary of Possible Tasks: a. Essential Tasks b. Optional Tasks	Task Troops required Remarks	

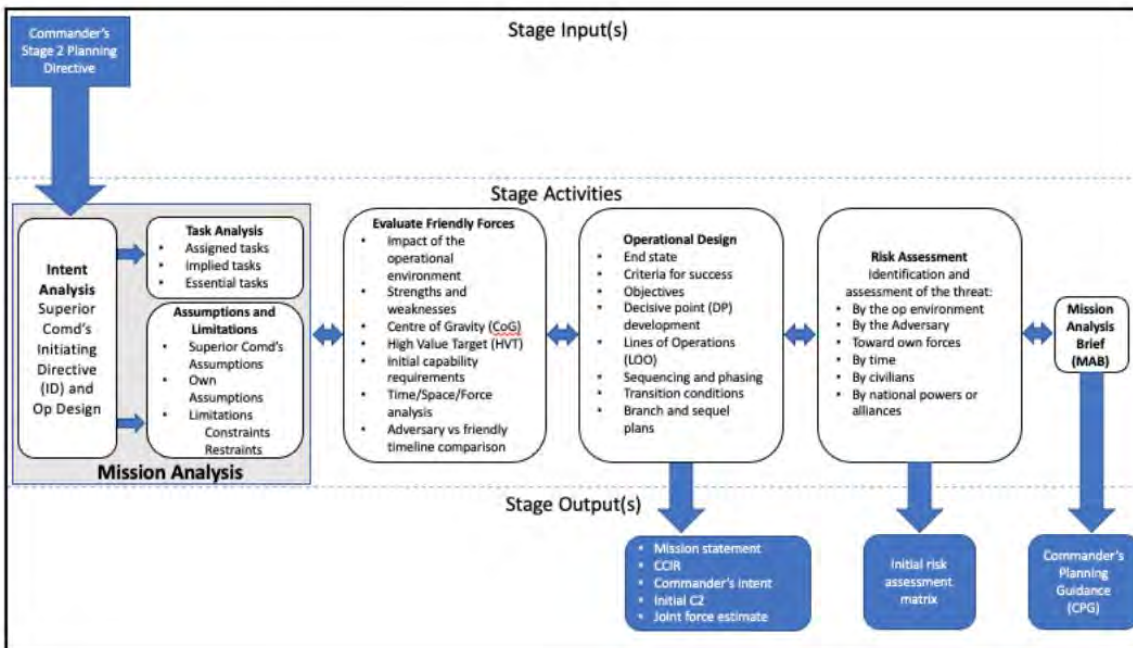
STEP 3 – CONSIDERATION OF COURSES OF ACTION (COA)		
Question/factor	Consideration/deduction	Tasks/constraints
(a)	(b)	(c)
What is common to all COA?		
COA 1 – concept of operations: a. Advantages b. Disadvantages		
COA 2 – concept of operations: a. Advantages b. Disadvantages		
COA 3 – concept of operations: a. Advantages b. Disadvantages		
Comparison of COA (Planning tools, war-gaming, etc can be used)		
STEP 4 – COMMANDER'S DECISION		
Question/factor	Consideration/deduction	Tasks/constraints
(a)	(b)	(c)
Decision: a. Selection of COA b. State: (1) Commander's intent (2) Concept of operations		
Issue supplementary warning order		

THE OPERATIONAL PLANNING PROCESS (OPP)

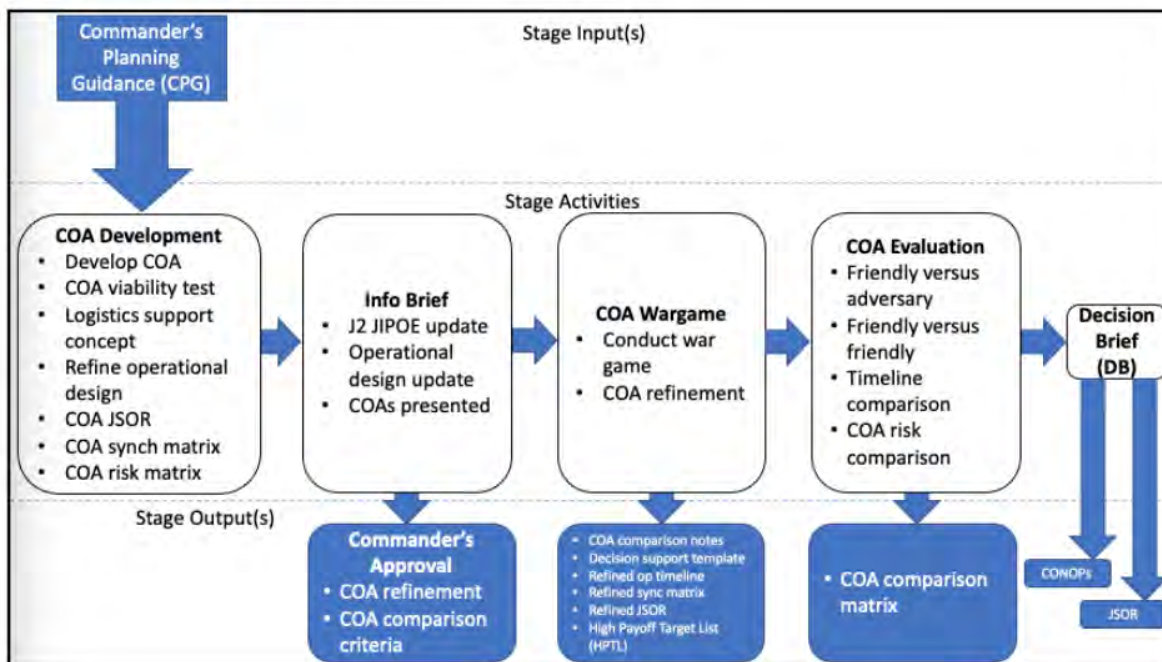
1. The Operational Planning Process, also known as the Collective Estimate, is primarily described in the Canadian Forces Joint Publication 5.0: The Operational Planning Process. It is an expansion of the sequence described in the Estimate, to include opportunities for group planning. It is the preferred model for design model used for complex activities planned at the high tactical or operational level.

Chapter 1 – CAF OPP Stage 1: Initiation

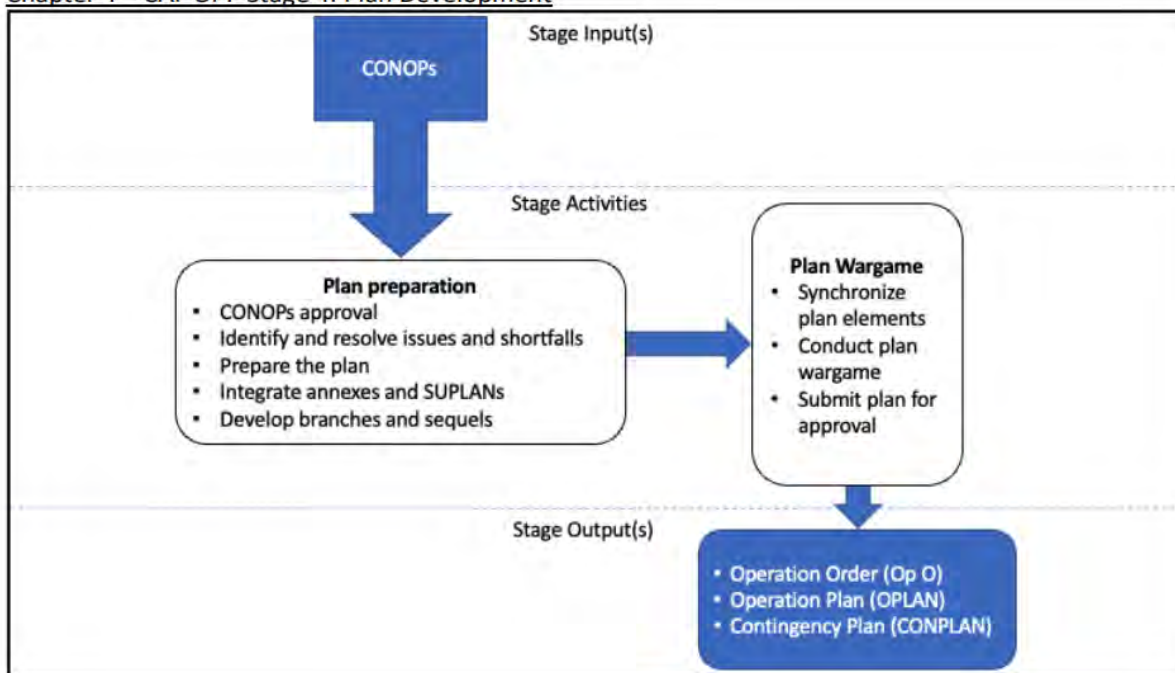
Chapter 2 – OPP Stage 2: Orientation



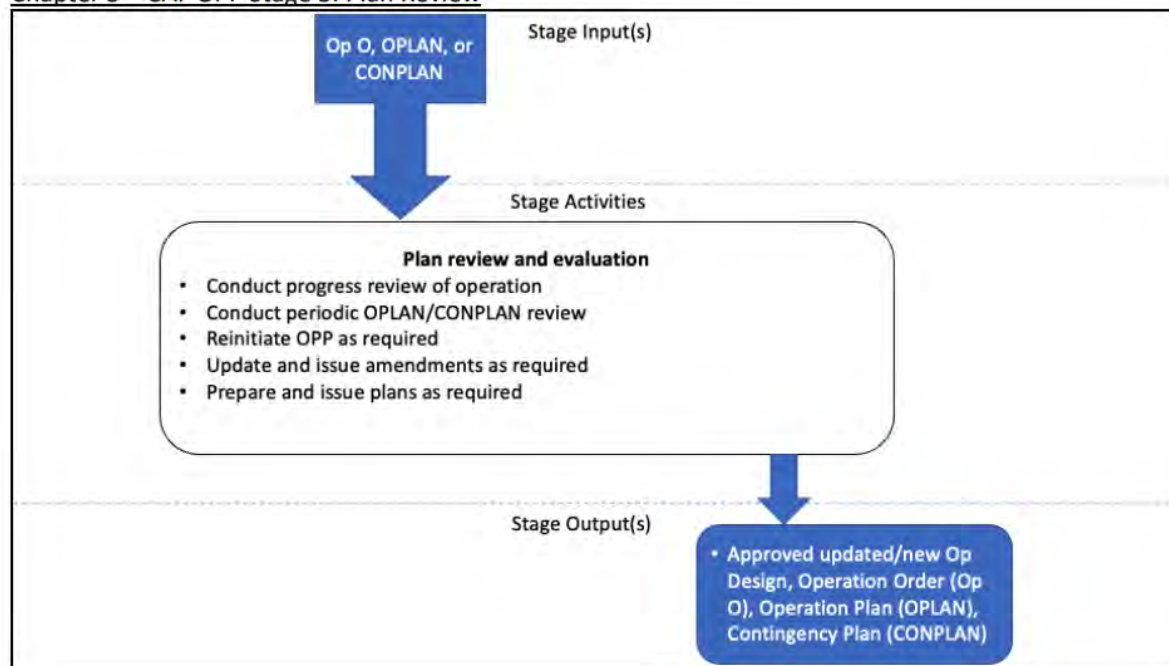
Chapter 3 – CAF OPP Stage 3: COA Development



Chapter 4 – CAF OPP Stage 4: Plan Development



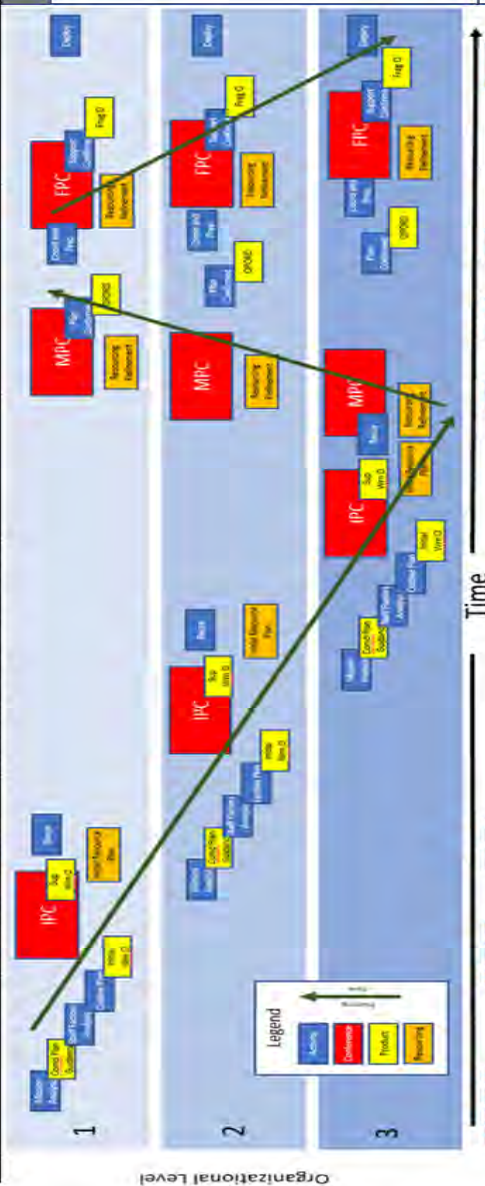
Chapter 5 – CAF OPP Stage 5: Plan Review



THE PLANNING CONFERENCE STRUCTURE ILLUSTRATED

Summary. This Annex illustrates a best-practice concept for the Planning Conference Structure. It demonstrates the flow of activities from receipt task direction to deployment for execution. This includes a summary of key planning events and products inputs/output. As well, the decisive points of Battle Procedure and Operational Planning Process have been layered onto the Planning Conference Structure in order to provide context with regards to sequencing and doctrinal foundations.

Command's Planning Guidance	Initial Warning Order	IPC	Supplemental Warning Order	MPC	Operation Order	IPC	Fragmentary Order
Higher Warning Order and/or order	CPG to Staff	Initial Warning Order	IPC outputs	Consolidation and Friction	MPC outputs	Preparations status	FPC outputs
Initial Time and Space	Factors Analysis	Subordinate Initial Time and Space	Commander's modified guidance	Identification between Recce-Informed Subordinate Plans	Situation updates	Resourcing status	Situation updates
	Detailed Time Estimate	Subordinate Mission Analysis		Resourcing Status			
	Detailed Map Study & Outline Plan						
Mission Analysis							
CPG to staff	Initial Warning Order likely including outline plan, tasks, general timings, recce guidance and support considerations	Task negotiation/confirmation Efficiency opportunity identification Recce Plan Considerations Bottom-up Planning Factor identification	Confirmation of plan changes identified during the IPC	Plan Friction De-confliction Plan Confirmation Resourcing Refinement	Order that confirms plans to include supporting annexes	Readiness Confirmation Plan modifications required to enable execution	Confirmation of plan modifications as required
						Outstanding Resource requirements	Outstanding Resource requirements



- Remarks

Planning Conference Structure

- **Participants:** The leaders of the subordinate organization attend the planning conference hosted by their superior organization leadership
- **Warning Orders:** Can occur as often as required and at any time between receipt of a higher warning order and issuing of an order. However, they are particularly useful sandwiching the OPC, because they help to convey the outline plan and thereby set conditions for a productive reconce cycle.
- **Rececs:** May or may not occur concurrently at various levels
- **Orders:** It is helpful to publish the Order following the OPC as a way of confirming an amplifying upon the decisions that were made during the conference.
- **Fragmentary Orders:** Amend the current activity can occur at any time following the issuing an order. They are particularly helpful following the OPC if the plan had to be modified due to situation changes or resource restrictions

time

