SAT: The Concept Behind
Unit Training Management

UTM is the use of SAT and Marine Corps training principles in a manner that maximizes training results and focuses unit training priorities on the wartime mission. Units cannot achieve and sustain proficiency on every possible training task. The Marine Corps has neither the funds nor the time for such an endeavor. Therefore, Marine Corps training must focus on wartime tasks. SAT assists commanders in identifying critical warfighting tasks, both for the individual and the unit, and it guides the Marine Corps' frugal application of limited resources. SAT is a systematic, problem-solving model used by commanders to produce an effective training program, and it is used in the development of all Marine Corps' training. For example, the application of SAT in the formal schools or operational units results in specific products that improve unit efficiency and maintain readiness. For instance, if applied in—

A formal school setting, a program of instruction is generated.
An operational unit, a short-range training plan is generated.

No matter how it is applied, SAT provides commanders with needed training management techniques to analyze, design, develop, implement, and evaluate performance-oriented training. It guides commanders in the use of scarce resources by identifying where resources are needed most in order to maintain readiness. The SAT process, in regards to UTM, consists of five phases: analysis, design, development, implementation, and evaluation (see fig. 3-1).

Analysis Phase

The analysis phase determines the unit's performance objectives. The unit's performance objectives are written as tasks that the unit must be prepared to accomplish. The commander begins this phase with a detailed mission analysis. The inputs to this analysis include the commander's higher headquarters' METL, supported and supporting unit METLs, campaign plans, table of organization (T/O) mission statements, contingency plans, anticipated missions, and doctrine. Assistance available from the G-5 (plans) section should be sought in order to conduct a comprehensive analysis. If the analysis is conducted properly, the commander deduces a listing of **all** the unit's specified and implied tasks. The commander further analyzes this comprehensive listing of tasks to determine the unit's mission-essential, warfighting tasks. By doing this, the commander identifies a core listing of tasks that the unit **must** be capable of performing in a warfighting environment, vice a huge listing of tasks they could accomplish if unconstrained by time or resources. This smaller, detailed listing of mission-essential tasks is the product of the analysis phase. The METL is the tool the commander uses to prioritize and focus unit training. The METL, once approved by higher headquarters, becomes the descriptive training document for the unit and provides a clear, warfighting-focused description of the highest level collective actions needed to execute wartime mission proficiency. The METL is the starting point for the design phase of SAT.

Design Phase

The purpose of the design phase is to design or layout a training plan for a unit. Different plans may be designed for similar units. The design of each unit's training plan is based primarily on the unit's level of proficiency in its METL tasks. Unit training plans may consist of long-range, midrange, and short-range plans (see chap.6 for additional information on training plans):

Long-range planning focuses on major exercises and the training needed to meet the commander's METL for the next 18-24 months. Facilities, logistics, evaluation of resources and personnel, and other factors must be included in the long-range plan.

Midrange (annual) planning details how major subordinate unit METLs support the unit commander's METLs. It further refines the details of major exercises. It plans for required facilities, logistics, etc. Acquisitions/arrangements that require 8-12 months lead time for training are included.

Short-range (quarterly) planning projects the training of collective tasks and drills of lower echelon units and all training events to be conducted in the next few months. The tasks, drills, and training events are taken from long-range and midrange plans.

During the design phase, the unit develops training plans that will result in the successful accomplishment of all mission-essential tasks. The unit's METL is the foundation used to develop its training plans. The METL is also supported by many other subordinate tasks from within the unit. Therefore, the unit training plan must address both unit METLs and subordinate tasks. The unit must plan for and schedule its training so that it successfully completes **all** of its mission-essential tasks. Appendix B provides an example of a battalion's METL and METL assessment.

The first step in the design phase is to relate mission-essential tasks from the METL to one or more published MPSs from the unit's applicable MCCRES volume in the MCO 3501.XX series. An MPS is a unit or collective performance objective that contains a performance statement, a condition statement, and a standard statement. An MPS strives to define an observable action that is a critical part of the unit's mission. Collectively, all of a unit's MPSs should cover all its potential missions. A unit should be trained to perform all its published MPSs, however no unit has the resources to train and sustain proficiency on every task. Therefore, a unit trains to the MPS that supports its METL, then it trains to other MPSs as time and resources allow.

Note
Contact Commanding General, Marine Corps Combat Development Command (C 461) if a mission-essential task cannot be related to a published MPS.

The second step in the design phase is to prioritize the training of mission-essential tasks. Mission-essential tasks are not prioritized, they are all equally essential. But, the training of the skills necessary to achieve proficiency in the performance of mission-essential tasks is prioritized. Training priorities are determined by the commander's assessment of a unit's ability to perform a task when compared to its associated MPSs. Evaluation of a unit's past performance aids a commander in determining a unit's future training priorities. For example, if a unit successfully accomplished one mission-essential task, but did not perform another mission-essential task to standard, the unit must schedule training to correct the identified deficiency.

The third step in the design phase is to relate further subordinate, collective, and individual tasks to the MPSs that have been associated to each mission-essential task. Individual tasks are published as ITSs. ITSs are tasks that specify the individual proficiency requirements that support unit mission performance. Formalized listings of ITSs have been developed over the years based on identification of individual tasks that must be accomplished in order to accomplish collective and unit tasks. These ITSs are found within the ITSS, a series of orders that provide guidelines as to the tasks an individual Marine should be able to do by grade and MOS.

Development Phase

During the development phase, commanders ensure that all logistical and background preparations are completed prior to the actual start of the training evolution. The generation, submission, and follow through on requests for transportation, budgeting, ammunition, and other items that support the scheduled training are a critical part of this phase. All personnel and resources are allocated so that preparatory work can be conducted that will allow for the smooth execution of the training plans. Preparatory work may require the generation of letters of instruction (LOI) from the commander that direct specific implementation of training plans. Such LOIs serve to provide guidance and direction for preparation for training.

It is also during this phase that trainers are trained to meet the needs of the particular training evolution. Trainers should review their instructional procedures and the materials they will present during assigned periods of instruction. Officers and SNCOs, who will lead units through training exercises, should review/define training objectives and goals in accordance with the guidance provided from the commander.

Implementation Phase

Training plans are executed during the implementation phase. Trainers

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should understand the desired performance, the standards, and the conditions under which training should occur. The implementation phase has three basic steps.

Staging of Resources and Personnel

This step involves the transition from the development phase (which planned, coordinated, and arranged all support for the training evolution) into the implementation phase (where the training evolution actually begins). During this step, all resources and personnel needed to conduct the training are assembled at the training site. This may involve transportation to the site, issue of weapons, placement of opposing force (OPFOR) units, etc., or it may be as simple as having a projector set up in a classroom and the troops assembled at the appropriate place

at the scheduled start time.

Conducting the Scheduled Exercise

During the execution of the exercise, trainers ensure that Marines know/understand the intended goals and procedures and that they receive the training needed to achieve the desired performance. For example, if the session is a platoon battle drill, it will contain formal instruction, demonstration, and practical application in accordance with the unit standing operating procedure (SOP).

Evaluation Phase

Evaluation is a continuous process that occurs at all echelons and during every phase of SAT. SAT is the dynamic process that allows continuous improvement to the training program by the application of evaluation techniques at any point along the process, not solely upon completion of a phase.

Commanders constantly evaluate planning and resource actions to ensure they are mission-oriented and that they build toward combat readiness. Leaders at all echelons evaluate leader and individual training performance and provide feedback to the chain of command, trainers, and those being trained.

Evaluation of unit training is the process of determining if the unit can accomplish the training objectives related to a specific training event. The drills and training exercises for a squad or crew are aimed at accomplishing the collective task(s) practiced in that drill/exercise. Training is evaluated when commanders, leaders, evaluators, or observers compare actual performance to the standards listed for that task. If evaluation indicates that a unit cannot perform to standard, that task becomes a priority for future training.

Developing a Checklist

The evaluator develops a checklist based on MPSs/ITSs and uses it to evaluate unit performance. A checklist can help to optimize training time by highlighting the strengths and deficiencies of the unit, therefore, focusing future training on what and who needs to be trained, rather than retraining the entire unit/event needlessly. The checklist also provides the evaluator with a quick reference tool that identifies specific training standards. During the training evolution, the evaluator can quickly refer to the checklist to ensure that training is being effectively carried out. This checklist usually states the objective (task/MPS) and the key substeps in the performance. Substeps include the collective tasks of subordinate units and the individual tasks of participating Marines. Substeps help the evaluator identify if a whole unit was deficient or if only a lower echelon unit needs additional training.

Conducting an After Action Review

This step occurs after the training evolution has been completed, but it is based on observations taken throughout the planning and execution cycles. From platoon-size lectures to battalion field exercises, the instructor/staff conducts an after action review (AAR) at all levels. AARs discuss what went right, what went wrong, and what needs to be changed in order to better accomplish the objectives. The AAR should be used as input during the evaluation phase.

Figure 3-1. SAT Process in UTM.

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