



PERFORMANCE EXPERT EMBEDMENT

BATTALION/SQUADRON LEADERSHIP

AS THE BATTALION/SQUADRON GATEKEEPERS

- Provide time for the Performance Expert (PE) to deliver a capabilities brief to the BN/SQDN and CO level leaders.
- Encourage CO CDRs to invite PEs to training meetings so they can work toward integrating psychological skills targeted at specific events.
- Designate an R2 liaison team consisting of junior officers to help with coordination between the unit and PEs.
- Consider PEs as part of the Special Staff.
- Consider ways for PEs to collaborate with others (e.g., clinical psychologist, Chaplain, BHO, Master Fitness Trainer [MFT], H2F staff, Master Resilience Trainer [MRT]).
- Ask the PE how the training or interactions support or reinforce the unit priorities.
 - Examples:
 - Lethality Enhancement Team: At the encouragement of a BDE CDR, PEs collaborated with other BDE personnel to teach about the psychological, physiological, and spiritual aspects of lethality and then used simulators to practice implementing psychological skills and concepts (e.g., goal setting, attention control, energy management)
 - Expert Counseling Course: At the request of a BDE CDR, PEs worked with senior leaders, Chaplains, and BHOs to deliver counseling training tailored to TLs, SLs, and PLs/PSGs



PRELIMINARY DISCUSSIONS

- Communicate unit priorities and mission to the PE.
- Review relevant portions of the DEOCS (and/or other unit surveys) and discuss potential COAs to target deficiencies.
- Identify and discuss preferred population (e.g., CO CDR, PLT leadership). Request a plan of action from the PE for this population. Request monthly updates on the plan of action.
- Discuss how the PE should prioritize their time (e.g., high risk populations, resilience, performance, culture, team cohesion, remedial PT, leader development [e.g., Platoon Leader Academy], academic preparation, esprit de corps days, Foundational Readiness Days).
- You may request a skill/concept-based (e.g., PE teaches a specific skill or concept) or kinesthetic (e.g., PT) capabilities brief if you prefer experiential learning.
- Request a capabilities brief and portfolio of their work.
- Describe the metrics that are critical for your unit and discuss how a PE could work to improve them.
- Discuss COAs with PEs for integrating additional collaborators (e.g., Chaplain, BHO, MFT, H2F staff, MRT).





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LOGISTICS



- Encourage S-3 shops to publish OPORDs for trainings to ensure participation.
- Ensure PE has space to work (e.g., classroom, office). An ideal desk location is in or near S-3 shop.
- Ensure PE has access to transportation to go to the field.
- Provide the PE a bulletin board so they can post contact information, skill information, etc.

CHECK-IN



- At 3 months, formally meet with the Performance Center Manager (PCM) and PE to ensure it is going well or determine a plan for course correction.

MEETINGS



- Schedule regular (e.g., once a month, once every six weeks) information meetings with the PE and other BN leadership (e.g., CSM, XO, S-3) to discuss trends and develop strategies to address challenges.
- Invite the PE to attend training meetings to help with deliberate planning and integration of mental skills.
- Allow the PE to include a slide during the BN training meetings to discuss unit trends and PE engagements with the unit. Highlight COs that are intentionally incorporating PEs into their training calendar.

HELPFUL HINTS:



- Invite PEs to participate in newcomers' briefs.
- Invite PEs to Hail and Farewells and holiday parties.
- PLT-level leadership doesn't have as many resources as their superiors. PEs are an excellent resource for them.
- Provide swag (e.g., t-shirt, mug) to the PE to wear or use around the footprint.
- At safety briefs, encourage Soldiers to use the PE.



- PEs have different areas of focus. These may be climate (typically at the BDE or BN level), performance (typically at the CO or PLT level), resilience, team cohesion (BDE-squad levels), academic performance training (individuals going to schools), etc.
- Ask PEs to contribute to the BN newsletter or social media site.



- PEs can go to the field. Consider transportation plans and other accommodations.



If you would like additional information, scan this code to send an email.

This information was compiled based on an evaluation conducted by the Walter Reed Army Institute of Research. v4, 19 OCT 2022

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