

# Brilliant Manoeuvres

How to Use Military  
Wisdom to Win Business  
Battles

RICHARD MARTIN

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# Foreword

As a student of military history (my father was in the first volunteer parachute regiment ever formed in the US in 1940) and as a successful global consultant, I've often been struck by the application of military principles to competitive business.

While business defeats are seldom fatal, and successes often ephemeral, they do lend themselves to analysis and deconstruction for learning purposes and in the pursuit of excellence. Unfortunately, there is no West Point or Sandhurst discipline for business executives.

To be able to lead people in ethical, aggressive, and compelling campaigns is a vital role for contemporary leadership. It's important to lead from the front. The highest casualty rate among any officers in the US Civil War was among brigadier generals, since they mounted the lone horse in front of a brigade and shouted, "Follow me!" Too many current military leaders are safe behind the lines in bunkers and compounds (or thousands of miles away in remote bases). Business leaders have no such luxury.

We also are witness to ethical lapses of immense proportion in business today, with sad examples at Enron, Anderson, Tyco, Murdoch's publishing empire and others sullyng once revered names. We can learn from the military here, as well:

*"Men who take up arms against one another in public war do not cease on this account to be moral beings, responsible to one another and to God."*

This admonition was from the US army military regulation of 1863, during the height of the Civil War.

During that war, the highly successful Confederate raider, General Nathan Bedford Forrest, was quoted as explaining his success by "I get there firstest with the mostest." (Many scholars consider this apocryphal since Forrest was an educated man.) Yet isn't that what Steve Jobs did at Apple, breaking new ground

with successful, albeit not perfect, innovations? The iPhone is one of the most dramatic new products since the Civil War.

Rich Martin, an acclaimed military officer and brilliant consultant, has distilled the best of military maneuvers into business brilliance. Very few people have the experiential base to do that. But Rich has mounted his horse and said, “Follow me!”

Congratulations on getting this far. Now start running after him.

Alan Weiss, PhD

Author, *Million Dollar Consulting* and *The Consulting Bible*

Former consultant to the US Air Force

# Preface

There have been many books over the years on how to apply elements of military strategy and leadership to business. In fact, we can say that it forms a kind of sub-genre within management and business literature. Probably the most famous work of military strategy is *The Art of War* by Sun Tzu, an ancient collection of aphorisms to guide military and political leaders in preparing for and prosecuting wars. It has been a mainstay of business executives and entrepreneurs who have sought inspiration in military wisdom in order to achieve business success. Clausewitz's masterwork *On War* has also been a source of inspiration for some. There have also been many books highlighting aspects of military leadership and strategy as relevant for a business audience.

However, I think this book is quite different from all of those other books. I say this for three reasons. First, it is based on my combined knowledge and experience of military command and business. I served for over 25 years as an infantry officer in the Canadian Army. After that, I started and have built a successful management consulting practice. I have been able to see the commonalities and the linkages between military and business strategy in action. The second reason this book is different is because it explains the relevance of various aspects of military wisdom and shows what is applicable and how, and what isn't applicable.

The third reason *Brilliant Manoeuvres* is different is that it is much more comprehensive and complete than any other book I know of that discusses the parallels between military wisdom and business. I haven't limited my survey to strategy or leadership, as important as these are. In this book you will find chapters on offensive and defensive strategies and tactics. There are details on military planning, decision-making, intelligence, and logistics that are simply not found anywhere outside highly specialized military doctrine manuals. I've presented the military concepts in such a way that the business leader will be able to apply them to strategic, operational, tactical, and leadership challenges. I've included a chapter on how military planners and leaders deal with the uncertainty, friction, and risks of

conflict. I also explain how the military techniques for dealing with these realities can be applied to business. Finally, the reader will find extensive discussions of organizational dynamics, including morale, mood, cohesion, and motivations, as well as an in-depth look at the military philosophy of leadership.

Whether you're a business executive or manager, an operational supervisor, someone involved in sales, a small or medium-business owner, or even just self-employed, I am sure that you can find something of value in the military wisdom I've revealed in this book. I also think that managers and leaders in all types of organizations, not just in business, can get a lot out of this book. Throughout, my intent has been to provide the best possible understanding of military wisdom for application in business and other non-military endeavours. I have chosen the word 'wisdom' carefully, because I think that it is the only word that fully conveys the richness of pragmatic thought that is applicable in the business sphere.

# Chapter 1

## How Can Military Wisdom Apply to Business?

*Rather than comparing war to art, we could more accurately compare it to commerce, which is also a conflict of human interests and activities; and it is still closer to politics, which in turn may be considered as a kind of commerce on a larger scale.*

*Carl von Clausewitz*

### How Business Concepts Helped Me Achieve A Military Mission

I commanded an infantry company on peacekeeping duty in Bosnia from August 1999 to late February 2000. The mission of my unit, a company comprised of around 150 soldiers, was to patrol a sector of about 4,000 square kilometres in northwest Bosnia, which included the small towns of Drvar and Bosansko Grahovo as well as several dozen villages and hamlets, hundreds of farms, and a forested mountain area. The area had been predominantly Serb until August 1995, when a Croat offensive led to the forcible expulsion of the 17,000 Serbs who had lived there. Within weeks, the Croat forces had resettled Croats in the newly acquired territory. These Croats were originally from central Bosnia, and had themselves been expelled from their homes earlier in the war.

Our force had to conduct patrols and actions in support of the Dayton Peace Accords that had been negotiated and agreed by the belligerent parties in December 1995. This was a mission led and conducted by multinational forces of the North Atlantic Treaty Organization (NATO). We also had to keep the peace, which involved supervising the activities of the Croat militia, Croat-dominated police, Croat-dominated intelligence operatives, or any other opponents of the peace accords,

such as Croat politicians and criminal elements. The summer of 1998 had been particularly agitated. The Croat militia had staged a major riot in the main town in my sector, Drvar, in order to prevent the return of Serbs to their homes. When we took over from the previous Canadian unit in early August of 1999, tensions were high once again in the sector. Ordinary Croats who had been resettled to the area held considerable animosity toward the NATO forces, and specifically us. However, it quickly became apparent that we were dealing with a situation where the Croat elites, by and large the same people who openly opposed the Dayton Accord, and militia had a stranglehold on the towns of Drvar and Bosansko Grahovo, and that they were aided in this by the local police and judicial system. In fact, many of the Croats, although hostile to Serbs, were more afraid of the Croat forces and criminal elements that had infiltrated businesses and corrupted local politicians than of the returning Serbs.

The conflict had basically gone underground by the time we had arrived in August 1999 but it still showed the pattern of a low-level insurgency. NATO, including the Canadian military forces, represented the government side, the side of law and order and of legitimate political authority. There were some politicians and elites at the local and Bosnian levels, people such as the Serb mayor of Drvar Momcilo Bajic as well as the Croat member of the Bosnian Presidency, Ante Jelavic, who supported the Dayton Peace Accords and the attempts to restore the rule of law. The majority of those with any kind of power in the sector, however, did not support the Dayton Peace Accords. The forces of peace and order and the forces of the opposition did not confront each other in open battle but rather were fighting for the “hearts and minds” of the population. If this term sounds familiar, it should not be surprising. It’s a pattern that has appeared in military counter-insurgency operations for decades. The British in Malaya (now Malaysia) in the 1950s claimed to be fighting for the ‘hearts and minds’ of the local population. The same was claimed in Vietnam, and then once again more recently in Iraq and Afghanistan.

As we settled into our sector in that hot summer of 1999, I conducted my estimate of the situation and realized that operational success would depend on us gaining the confidence of the local populace while simultaneously discrediting the opponents of the Dayton Accords. We had to ally ourselves with the various agencies of the international community and non-governmental organizations (NGOs). The former included the UN High Commission for Refugees, the Office of the NATO High Representative, the International Police Task Force, and the Organization for Security and Cooperation in Europe. The NGOs included the Red Cross, CARE, Oxfam, and several other European based humanitarian relief and development organizations. In fact, we had to support anyone in the populace and the International Community

who was trying to rebuild the country along the lines of the peace accords.

Our tactics were to be strict in enforcing the peace accords in our dealings with the Croat militia and politicians as well as Croat strongmen, politicians, businessmen, media, local organizations, and the Catholic Croat and Orthodox Serb clergies. We ourselves would oppose those who opposed the peaceful return and resettlement of Serbs using the most effective military weapons we had at our disposal. This involved constant patrolling, the actual physical presence of forces, inspection of military and police units, use of vehicle checkpoints, dialogue with the local population and officials, media activities, distribution of leaflets, and assistance to those in need either directly through our own humanitarian relief efforts, or more commonly by supporting and ensuring the security of the various international relief and security agencies and NGOs.

When I explained to my troops our role and my plan to achieve our mission, I deliberately compared what we were doing to a business situation. I told my troops that we were selling a product to the population, and that product was peace and security. To do that, we had to win them over to our position and prove to them that we were worthy of their trust. In other words, we had to show consistently and unwaveringly that they were better off supporting the Dayton Peace Accords and the central Bosnian government than the Croat criminal elements, corrupt politicians and policemen, and the Croat militia. I deliberately compared this to marketing, advertising and promotion. We would repeatedly tell the local people the same thing, and then act in accordance with our 'brand,' as it were. I told our soldiers we would be consistent, and that these methods would be effective over time.

My collaborators and I saw the obvious parallels on the ground between our combined peacekeeping and counter-insurgency role and a business that is working to distinguish itself from competitors to win customers to its products and services. Early in my military career, I had acquired a Bachelor's degree in business administration at the *Collège militaire royal de Saint-Jean* in St-Jean-sur-Richelieu, Quebec in Canada. This basic, theoretical knowledge, plus my experience in working with industry as a project manager on weapons systems development and acquisition projects in the mid-1990s proved to be essential in helping me understand the military and security situation in Bosnia, and to develop a strategy and operational plan to achieve our mission.

I have recounted this personal story to illustrate how business knowledge can be of use in the realm of military strategy. The aim of this book is, however, to do the converse, that is, to show the applicability of timeless military wisdom to achieving success in business. I will demonstrate the metaphorical, conceptual and practical similarities and linkages between war and business, and between military thinking

and business thinking. I will provide practical tools to apply the military principles and techniques of strategy, operational art, tactics, logistics, decision-making, and planning. I will also explore the principles of military leadership, cohesion and morale and their application to organizational dynamics and leadership in a business context.

In the remainder of this chapter, we consider the influence of military theory and practice on business and organizational management as it has evolved since the late 19th century. I will then provide a bit of my background so the reader can appreciate how I came to understand and elaborate the usefulness of military thought for business and management. Next, this chapter will serve as a primer on the structure of military thought, especially as it concerns the levels of war: strategy, operational art, tactics, as well as the relationship of the levels of war to the disciplines of logistics and planning and to the physical and moral planes of war. This will provide the framework for understanding the linkages in each of the subsequent chapters.

## **How Military Thought Influences Business Practice**

There are three ways in which military thinking and experience influence business. The first is metaphorical. As an example of such metaphorical language, Warren Buffett has often stated that he looks for “economic castles protected by unbreachable moats”. By this, he means that he seeks to invest in businesses that have a virtually unassailable competitive advantage. By the way, Buffet has also called investment derivatives “financial weapons of mass destruction,” a pointed comment about the financial meltdown that shook the world in 2008 and 2009.

In my work as a consultant, I have often noted how entrepreneurs and executives use colourful military language as well as examples from military history to illustrate points they are trying to make when motivating employees. In fact, this metaphorical use of military language is so common that we can deduce that many business executives, especially CEOs, like to see themselves as warriors and generals, fighting off competitors and conquering new markets. They talk about attacking competitors, defending turf, firing warning shots, establishing beachheads, bypassing the competition, rallying the troops, and so on. This metaphorical language indicates that there does exist a profound linkage between business and military strategy, at least in the minds of many business people.

The second type of linkage is conceptual. This implies that there are underlying similarities between business and military theory and practice, which can be of practical import. The opening story of this chapter is a perfect illustration of this



conceptual linkage. The conceptual similarities between the situation in Bosnia and that of a business working to differentiate itself relative to competitors was readily apparent to any thoughtful observer. I believe that it is these conceptual similarities that people intuit when they use military examples in a metaphorical sense.

One of the most prevalent similarities can be found in the area of strategy. Strategy in and of itself was originally a purely military concept. The term comes from the Greek word for generalship, *stratēgia* from *strategos*, which means general or field commander. The term became increasingly associated with the highest levels of decision-making and the general policy framework of business organizations. Peter Drucker claimed that his book *Managing for Results*, published in 1964, was the first book to talk about business strategy even though it didn't explicitly use the term. Another early major use of the term in a business context is actually attributable to Alfred Chandler in his book, *Strategy and Structure*, which appeared in 1962, though it had probably already entered common colloquial usage by then. By the same token, salespeople will frequently talk about tactics when they describe selling and closing techniques. They've obviously intuited the fact that tactics are much more situational than strategic, and that they are applied in the heat of battle to achieve immediate results.

Much of the discussion in this book builds on the metaphorical and conceptual linkages between war and military thinking with a view to isolating techniques and practices that can be adopted for resolving business problems such as strategy, positioning, competitiveness, leadership, planning, and decision-making. Since the end of the 19th century, business theorists and captains of industry have consistently used methods and practices developed in the military for application in business. For instance, in the late 19th century, the French management theorist Henri Fayol explicitly adopted the concept of unity of command, which is a vital principle of military command theory, and applied it to the nascent discipline of business organization. Fayol looked at how military units were commanded and organized, and determined that a key factor in ensuring effective and efficient command of forces was that soldiers only took orders from one person, their immediate commander. Thus, military forces were organized into a nested hierarchy of progressively smaller and more specialized units, each one commanded by only one individual. He advocated the same type of structure for businesses. Peter Drucker claimed that business structure, particularly the hierarchical framework and the multi-divisional structure, was inspired by the composition of armies and the Catholic Church. Indeed, there are only so many ways to structure a major enterprise involving large numbers of people and significant resources. In his history of American business strategy and structure, Alfred Chandler traced the line of influence from the railroads

in the 1850s to the multi-divisional corporations of the 1920s. He showed how the railroads created multi-functional units under the authority of a single individual with a central headquarters to coordinate planning and allocation of resources. This led to the distinction in business of line and staff managers. Although Chandler didn't explicitly note the similarities to military structures, the fact that line and staff are military terms clearly indicates the influence of military conceptions of planning, decision-making, command relationships, and communications. He also noted that the executives and staff officers in headquarters were expected to make strategic decisions, whereas the line managers in field units were expected to make tactical decisions.

The final linkage is technical. There are many technical areas of expertise that were either developed for military use, or that developed as a result of wartime efforts. For example, as described in the *Wiley-Blackwell Handbook of Individual Differences*, psychometric testing for ability and temperament was in its infancy in 1917 when the United States entered the First World War. However, the need to raise a huge army in a short period of time, and to select for various military jobs such as officers, pilots, and technicians, led the U.S. Army to use the various extant measures of IQ and to also develop its own selection tests, the Army Alpha and the Army Beta tests. This relationship continued during the Second World War. A workforce of 1,500 psychologists was employed by the U.S. Army Air Force to develop selection and training programs. For instance, Air Force psychologists were able to predict future success on pilot training using various psychometric measures of ability. Another technical field that originated through military necessity is operations research. The Allies in World War II faced a number of problems that called for mathematical modelling to optimize allocation of resources and decision-making. The first major application was for the Battle of Britain during which the Royal Air Force had to determine where to position its radar sites to maximize coverage of the air approaches to Britain. They then had to optimize the deployment of their limited fleet of fighter planes so they could most effectively intercept and destroy the German bombers attacking the country. Later on in the war, British, American and Canadian naval forces and convoys had to be optimally assembled, routed and protected in order to maximize the chances of survival against German submarine attacks during the Atlantic crossing. This technique was combined with the decrypts of German radio signals to limit the impact of German U-Boat warfare on the course of the war. During the 1950s, operations research was applied to the management of the massive U.S. Navy Polaris missile and nuclear submarine programme, initially in the form of the PERT-CPM scheduling approach. This, along with the need to more adequately manage the massive spending on weapons system development during

the Cold War, led to the full development of project management as a discipline.

These are just some of the technical disciplines that either originated as a result of military necessity or were greatly accelerated owing to wartime exigencies. The main point is that there has been a flow of theory and practice from warfare and military forces to civilian applications, mainly in business and organizational management. In her excellent work, *The Capitalist Philosophers*, Andrea Gabor wrote that the expansion of the Army Air Forces during WWII “needed new management systems and a new breed of manager. Modern logistics, cost accounting, and systems analysis owe much to the systems developed by the Army Air Forces during World War II. As managers and experts attached to the Army Air Forces moved back into civilian life after the war... these men left their mark on everything from the revival of consumer production after the war to military and government policy during the Vietnam War era.”

## How I Came to Realize the Usefulness of Military Parallels for Business

It should be fairly obvious by now that I am not the first person to see the parallels and usefulness of military wisdom for business theory and practice. However, I didn't come to that realization easily. In fact, it had to be coaxed out of me to a certain extent. The story of how I gradually changed my thinking is germane since I believe someone without my combined military and business experience and expertise might not see the usefulness, thereby missing the lessons of this book.

I joined the Canadian Armed Forces right out of high school, when I was 18. I had wanted to be a soldier since at least grade 8, and my parents often remarked that, in fact, I had wanted to be a soldier when I was quite young even before I actually can remember. When I was a teenager, military history, aircraft, and weaponry fascinated me. I could name the different types of tanks and fighter planes as well as many of the Canadian, American, British, and Soviet classes of naval warships. In other words, I was a military nerd, a military geek in high school. Thus, I applied for military college in my final year of high school. I was reasonably good in mathematics and the physical sciences, so I imagined I wanted to study engineering even if another part of me never doubted that I actually wanted to be an infantry officer. Military college was a fabulous experience for me. I made many lifelong friends and met the challenges of being an officer cadet, learning the basic principles of management and leadership, this at an age when most young men were struggling to pay their way through school by bartending or doing similar non-supervisory jobs. I was trained formally in leadership when I attended Basic

Officer Training Course in Chilliwack, BC, during the summer of 1981, and then subsequently in leadership and tactics so that I might become a platoon commander after my Infantry Officer Basic Course. I followed the usual military college pattern and did this in phases during successive summers from 1982 to 1984.

Meanwhile, I realized during my first academic year at *Collège militaire royal de Saint-Jean* that I wasn't really cut out for studying science and engineering. Instead, I found myself attracted to the study of business administration. That's the program I chose to pursue, and so I completed a Bachelor of Administration degree in 1985. I was then commissioned as a second lieutenant in the 3rd Battalion of the *Royal 22ième Régiment*, stationed in Valcartier, located just north of Quebec City. I served initially in Valcartier from 1985 to 1988, fulfilling my role as a platoon commander and then assistant operations officer in the battalion headquarters. In the summer of 1988, I was posted to the 1st Battalion of my regiment in Lahr, Germany, where I commanded a rifle platoon for another year. Following that, I was promoted to Captain and served as a junior staff officer in the headquarters of 4th Canadian Mechanized Brigade Group and then 1st Canadian Division, both in Germany. During that initial five-year period, I participated in numerous exercises and training opportunities in Canada, Germany, Norway and France. I got to hone my skills as a junior officer in charge of senior NCOs and junior-ranking soldiers, both in garrison and on exercise. I also learned the rudiments of basic staff work and administrative writing, and attended a number of courses on advanced tactics.

Up until then, my path had been quite conventional for a young infantry officer. I can't say that I got to apply my business degree very much. My knowledge and expertise in all-arms tactics, as well as command and leadership evolved considerably during this period, but my knowledge of business remained as theoretical as the day I had graduated from military college. I was developing in terms of military theory and practice but not on the business and management side of things. This began to change in 1992, when I was selected to attend a yearlong British Army technical staff course at the Royal Military College of Science in Shrivenham, England. I had always been very interested in military technology and history, as well as the detailed characteristics of weapons systems. This course allowed me to indulge my passion in this area by discovering the intricacies of system development and design. It was also a wonderful experience to live in the UK for a year. This was also my first real contact with industry, as the curriculum included industrial visits to factories and facilities of companies and agencies involved in research and development and weapons systems manufacture. I visited factories such as those at Alvis, the Royal Ordnance Factories, and GKN Sankey in the UK, and GIAT and Michelin in France. For the first time, I saw the practical application of many of the business management

principles I had learned in theoretical terms during my academic studies.

I was posted back to Canada in early 1993 to serve in National Defence Headquarters (NDHQ) in Ottawa. I was employed as a technical staff officer in a project management office for acquisition of an anti-tank missile system. This brought me into close working relationships with project engineers, technicians, research scientists, marketing and sales representatives, and employees of other federal government departments. It was a real eye opener since I noticed the utility of tactical planning and decision-making tools for general problem solving and managerial tasks. It was also the first time in my career that I could apply some of the basic business management skills such as bookkeeping, marketing, operations management, production management, etc. I ultimately served five years until 1998 in the anti-armour project management office and the Directorate of Land Requirements in NDHQ. Early in that period, I was assigned to develop a project schedule and work breakdown structure for a project using a project management software package. This got me interested in the field of project management, so I applied for part-time study in the Masters of Project Management at the *Université du Québec en Outaouais* in Gatineau, Quebec, just across the Ottawa River from Ottawa. I completed the degree in 1997 and learned along the way that the discipline of project management was almost completely a creation of the defence and weapons system sector.

In the second half of 1997, I attended the Canadian Land Force Command and Staff College in Kingston, Ontario to complete my Army Command and Staff Course. This is the course an officer needs to be considered a qualified senior line or staff officer, at least in the Canadian Army. In early 1998, I was promoted to the rank of major, and took command of an infantry rifle company in the 1st Battalion of the *Royal 22ième Régiment*. It is in that role that I commanded a company group on peacekeeping duty in Bosnia from August 1999 to February 2000, as described in the opening section of this chapter.

In this role, I honed my command and leadership skills, and I finally got to apply the training and development I had undergone over the years. The environment in Bosnia was not one of high intensity warfare but there was definitely a tension, as described above. This was the high point of my military career since I had to apply all of my resolve and diplomatic skills in dealing with local authorities, citizens, and representatives of the international community. In fact, under my leadership, my company was instrumental in securing the safe return of over 2,000 displaced persons during our six-month rotation in theatre. University of Calgary military historian David Bercuson, who had visited our camp in early September 1999 with a senior delegation representing the Canadian Defence Minister, described our work

and wrote about it in the *National Post* after returning to Canada, writing that my company and I “could do no wrong.”

As the tour in Bosnia came to an end, I was faced with the question of what I wanted to do next. I had been on a high, living on adrenaline for almost a year by then. I was 38 years old and fast approaching 20 years of service. I would have been allowed to retire after 20 years with a modest pension. I seriously considered doing so, thinking that I could work in the defence industry. However, I also developed a passion for study and research when I had done my masters in project management. With my knowledge of military technology and passion for military history, I decided that I would like to try a shot at university teaching. The only available positions were at the Royal Military College of Canada in Kingston. As there were no teaching positions open for officers that year and I didn't have a PhD, I accepted a job on the military staff at the College, with the hope of applying for the War Studies doctoral program at RMC. I was posted with my family from Valcartier to Kingston in the summer of 2000, and applied to the War Studies program during the following months.

I was accepted and started full-time doctoral course work in the fall of 2001. Although I initially enjoyed my studies, I came to realize that I wasn't really cut out for the War Studies program, as I found it too focused on military history. I simply couldn't see myself doing a dissertation and then teaching military history as a second career. I wanted to be in business for myself, possibly building a training company. With that being said, however, I studied with one of the most prolific Cold War historians in Canada, Dr. Sean Maloney, an expert in the history of UN peacekeeping and in Canada's military operations and deployments since the end of the Second World War. Amongst other things, Sean led me to the study of all the major theorists of war, from Sun Tzu and Thucydides to Mao Tse Tung, Clausewitz, and Sir Robert Thompson. I also developed a deep understanding of the dynamics of the Cold War and the role of UN peacekeeping, especially smaller countries' contribution thereto and to maintaining the balance of power throughout the Cold War. In his course about contemporary warfare, Maloney also delved deeply into the Balkans and other post-Cold War conflicts. Thus, I was able to relate what I had experienced in Bosnia to the theoretical constructs he presented, which was indeed fascinating.

After setting aside my PhD ambitions for the time being, at least in War Studies, I was posted to the Directorate of Army Training in the Land Force Doctrine and Training System, also located in Kingston, where I served until my retirement from the Army in May 2006. This assignment influenced my current thinking, including my realization of the general utility of military decision-making and problem-

solving approaches. I worked closely with a number of training development and personnel selection officers on the modernization of the Army's junior officer and NCO leadership development programs. I was also able to use all my knowledge and expertise in various fields such as project management, training management, tactical command and leadership, research and development, scholarly research, personnel management, staff planning and decision-making processes, as well as using my general analytical and synthetic skills.

I retired in early May 2006 after 26 years of service in the Canadian Forces. I was proud of my service, but I would be lying if I said that I wasn't relieved. Military retirement can be a difficult and emotional process for career soldiers, and I certainly experienced my share of angst. To ease the transition, I had accepted a one-year contract position with a defence contractor with offices in Kingston. My plan was to work for that company for a year, and then to move to the Montreal area to start a training business, as I had promised my wife six years before when I had been posted to Kingston. However, no sooner had I left the military and started in my defence contractor job that I wanted to start my own business. One day, I was browsing the business section of a local bookstore and saw a book by Alan Weiss, called *Million Dollar Consulting*. I bought the book, read it over the course of a few days, and decided right then and there that I was going to be an independent management consultant. By early June, I had enrolled in Weiss's "Million Dollar Consulting College" held in Boston in October 2006. By the end of June, I had registered my business as Alcera Consulting, obtained my tax numbers, and started developing a website and collateral materials. I had never been in business, even though I had basically two business management degrees. With the help of Weiss's books, training, and mentoring, I now had a business model. I left the defence contractor in August of that same summer, and started marketing my services. My first client was the military unit where I had been hired to work for the defence contractor. It was pretty iffy at the beginning and completely based on my previous military work, but at least I was in business and I began earning revenue.

When I first started marketing my services to civilian organizations and business clients, my impulse was to play down my military background, and to under-emphasize the relevance of military processes and practices for business. Even though I knew the knowledge and skills I had acquired in the military were all highly relevant to business—I used many of them everyday myself—I hesitated to point out what I felt were obvious similarities and applications of military thinking to business. In fact, I was so reticent to make these linkages, that I would deliberately avoid making them. For instance, I had gotten a mandate to develop and deliver a training package on adaptation and change management for a major corporation



in the financial sector. My buyer was a VP, and he had specifically hired me because of my military background. I was delivering one of the workshops when one of the participants asked me to tell some military anecdotes. In fact, he was asking me to show how military knowledge could be useful to the topic at hand. I hesitated, and then told a quick anecdote. I refused to continue in this vein even though several course participants wanted me to elaborate, finding the military example fascinating and relevant. It was only a few years later that I finally realized that I had unique insights to offer to business managers, executives, entrepreneurs, and managers in other sectors. With encouragement from my business mentor, Alan Weiss, numerous consulting colleagues, family and friends, I started to write more and more about the applications of military concepts and practices for successful business outcomes. I also started to pepper my conversations with clients and prospects with personal military anecdotes, illustrations and comparisons of business and military principles and concepts, historical examples, and metaphors. I immediately noticed the interest this change produced, as well as the power of the metaphors and examples I used to convey the military principles and teachings I increasingly found were relevant to business.

I finally realized just how deep the interest and need is for a detailed and practical exposition of the most relevant principles, teachings, techniques, and concepts from military theory and practice for business. Thus, the book you are reading. As you can see from my overview of the history of the use of military applications in business and organizational settings, this is not a novel idea. There have also been other books in the genre, and the popularity of such works as Sun Tzu's *The Art of War* and Robert Greene's *The 48 Laws of Power*, and their presence on the shelves of the business section in bookstores prove there is a continuing fascination with and applicability of military theory and practices for business and management. Furthermore, as I showed from my personal story and experience in Bosnia, I feel that I am uniquely qualified as a former career soldier and now a management consultant to interpret military insights for a business audience.

## Of Levels and Planes

The title of this section may have implied that I would be talking about carpentry, but in actuality I want to explain two important concepts from military thought that have theoretical and practical importance for business, and will be critical as this book progresses. The first concept concerns what are known as the 'levels of war'; the second concerns 'planes of war.' It is important to understand these concepts in their military usage in order to better apply them to the sphere of business. The ideas



## HOW CAN MILITARY WISDOM APPLY TO BUSINESS?

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of levels and planes of war provide a conceptual framework for warfare and military thought, and they also provide a conceptual framework applicable to business.

There are three levels of war: strategy, operational art, and tactics. In its purest form, strategy is the theory and practice of raising and employing armies to achieve political ends. I use the term 'army' in a generic sense for all military forces, including navies and air forces. Historically, it is only in the modern period that states have consistently raised and maintained large standing armies. There were exceptions in the past such as in ancient Rome but they were few. To raise and maintain an army for any length of time, one has to be able to both justify its existence and to finance it. The first need is largely political in nature; this means you have to have a good reason to create and maintain the army. The second need follows logically from the first, as soldiers, weapons and their upkeep require huge amounts of capital, labour, time, and other resources. They are a huge drain on a country's treasury and resources. As Sun Tzu said in *The Art of War*, "Warfare is the greatest affair of state; it must be thoroughly pondered and studied." The *raison d'être* of the army and its payment, equipping and financing require considered attention from politicians and the highest military commanders. However, it isn't enough to have an army or any other type of armed force. One also must know how to employ it judiciously. Theorists usually distinguish between 'grand strategy', which involves the political leadership of the country in making fundamental existential decisions and setting goals, and 'military strategy', the realm of military leadership, which involves the actual employment of military forces to achieve political ends. In other words, grand strategy is about setting war aims and broad parameters for action including the political, social, and financial mobilisation of the country, and military strategy is about actually fighting the war, whether it is all-out war or a more limited form of conflict or deployment of forces.

There are obvious parallels between the pure military conception of strategy and its application to business. Previously, we described how business theorists and practitioners have come to the realization that the most fundamental decisions about a business, that is, its goals, purpose, character, and resourcing, were conceptually similar to the domain of strategy. Thus, strategy in the business and organizational realm seeks to ask and answer the same type of questions as strategy in realm of warfare and conflict. What is our purpose? What are our fundamental values? What is our market? What are our goals? What are our key advantages and how should we exploit these to outwit the competition and secure our future? How should we be structured and organized? Where and when should we operate? In exactly what business are we? What resources are required? How should we pay for it? How will we know we've achieved our aims? In business, this corresponds to corporate

strategy, and it is equivalent to grand strategy in the military realm. On the other hand, competitive—or business—strategy is concerned with achieving transient or sustained competitive advantages through superior positioning and execution. This is equivalent to the notion of military strategy in the military domain.

Another level of war that most people readily apply to business is that of tactics. Simply put, tactics are the theory and practice of achieving your aims in the heat of battle. One way to remember the distinction between strategy and tactics is to look at their etymologies. As noted previously, strategy comes from the Greek word for general. Generals usually aren't involved in hand-to-hand combat with the enemy, unless something has gone terribly wrong. Tactics comes from the Greek term *taktike*, which means to arrange or order things. In other words, tactics refer to how to arrange troops on the field of battle and manoeuvre them to achieve success. I sometimes use a mnemonic device that helps to distinguish between the two and explains their inherent meaning. When thinking of strategy, think of 'stratosphere'; in other words, strategy implies one is at an altitude, overlooking the battlefield but not getting bloodied or muddied. When thinking of tactics, think of the word 'tactile'; in other words, actual contact and combat with the enemy.

Most day-to-day situations in business are tactical in nature. For instance, company strategy aims to offer certain products or services in particular markets to meet specific needs relative to competitors. However, the actual business of finding customers and closing business, making the sale, is tactical in nature. Another example: A company president decides to change the company's culture. Working with her team of senior executives, she identifies key objectives, values, and processes to support this goal. Managers and employees at the different levels of the organization then have to implement the strategic change on a day-to-day basis, in myriad situations, with many different people, both internally and externally. These micro-decisions and actions are clearly tactical in nature, as they are if taken in the heat of battle.

Strategy and tactics also differ in terms of how they are conceived, developed and communicated. Strategy is somewhat amenable to systematization, but it is ultimately very artful. No two situations or organizations will ever call for the same strategy. It also requires great intelligence and opportunism. Tactics, on the other hand, are inherently repetitive, mechanical, and process-oriented. Should such-and-such occur, or the enemy or competition or customer do this, then take such-and-such action. If that doesn't work, then try this other action. Tactics are therefore fairly easy to systematize and indeed must be systematized and as a result, tactics can be taught and evaluated. In summary, we can say that each strategy is ultimately unique, whereas tactics are repeated.

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In centuries past, the levels of strategy and tactics covered the whole of warfare. This was because military forces were smaller, more ephemeral and less capable with shorter range of action and less staying power. Armies were raised for purposes of war when there was a clear threat or when a ruler wanted to conquer another state. Soldiers were often paid from the proceeds of campaigning, even by rape and pillage, and were expected to live off the land, at the expense of its inhabitants. There was no personnel management, discipline was harsh and inhumane by modern standards, and logistics basically involved raising taxes or stealing money to pay for the war. In addition, armies were poorly articulated. This means that units had few sub-divisions, were mostly uniform in form and function, and tended to be deployed in simple close-order formations using only mechanical manoeuvres learned by rote.

The wars of the French Revolution and Napoleon changed all of that. Probably for the first time in history, a country raised huge armies consisting of untrained conscripts armed with standard weapons, and formed into large articulated units with fairly consistent leadership. Napoleon's *Grande Armée* also included large artillery forces, heavy and light cavalry, engineers, and a *corps d'intendance*, an administrative element that accompanied armies to ensure their supply and maintenance in the field. The French army was huge by existing standards. It therefore required a whole different level of organization and structure. Consequently, balanced divisions consisting of all arms were created, and these were then grouped into army corps and field armies, under generals of progressively higher rank. Senior command was attributed almost solely on the basis of competence in battle. Furthermore, political ideology and propaganda became part of the armoury of the French nation at arms. This was truly a formidable and frightful force.

The French had multiple enemies on numerous fronts, and had to fight enemies on many fronts simultaneously for years on end. Whereas wars had until then tended to be rather short, they were now protracted, intense, and costly. The old strategy and tactics were clearly insufficient. The French, therefore, developed the first notions of 'operational art,' and this level became increasingly elaborated throughout the 19th century, reaching its full development in the world wars and modern theories of war. In a nutshell, operational art is the theory and practice of combining campaigns and battles to achieve war aims and to create the conditions for battlefield success, whether these are material, human or technical. To do so, you need to develop clear war aims, campaign plans, permanent staffs of specialized planners, communication methods, intelligence analysts, and logisticians to create detailed operational plans and orders. While most military theorists treat logistics as a separate domain, for the purposes of comparison and application to business

situations, we might consider it part of operational art even though it's more of a science. The same can be said of the many technical approaches that are used in modern military forces, such as in operations research, personnel selection, and training and development. Operational art in its widest sense is probably the level of warfare with the greatest number of extant applications of military theories and practices in business. Moreover, all of the specialized areas of business management, such as finance, human resources, business intelligence, marketing and promotion, operations and production management, and provisioning have clear parallels in the military realm. The key commonality is that these domains all support the aim of achieving strategic success by enabling and supporting successful tactical execution. Operational art and its various technical and managerial manifestations is the conceptual glue that links strategy and tactics, both in the military and business realms.

There is another way in which war and conflict can be relevant to the realm of business, and this is the notion of planes of warfare. Wars and other military conflicts play out on a physical plane and a moral plane. The physical plane is the whole material underpinning of war and combat: force ratios, weapons characteristics, material resources, money, people, etc. However, every historian, theoretician and practitioner of war and conflict knows that war and conflict occur just as much in the head and heart as on the field of battle. History is full of examples of large armies being defeated by much smaller forces. This is because psychological forces can sometimes be just as effective and efficient as physical forces. This is why leadership, morale, cohesion, subterfuge, surprise, and cunning are so fundamental to success in battle and in conflict in general.

The same applies to business. There is clearly a physical plane, involving calculations of resources, finances, technical characteristics of products and services, markets, costs, prices, etc. But there is also definitely a moral plane, where psychological and ethical factors play out and determine the relative success of strategies, business models, and business tactics. The moral planes of war and business are also similar in that both reflect the fundamental uncertainty and emotions involved in competing interests and random causal factors. This is why Clausewitz compared war to commerce: They are both “conflicts of human interests and activities.”

The aim of this chapter has been to establish the fundamental utility of military thought and practice to business. Through my personal experiences in Bosnia and throughout my military career, I showed how I came to see the profound metaphorical, conceptual and technical linkages between the two domains. I also showed how the basic logical framework for thinking about war and conflict—the

levels of strategy, operational art, and tactics as they play out on the physical and moral, psychological planes—provide a ready-made and accepted framework for thinking about business.

## **How This Book Is Organized**

The remainder of this book provides detailed applications of military theory and practice for business. Chapter two shows how to apply offensive principles of war to business strategy, operations, tactics, and organizational dynamics in general. In Chapter three, I do the same thing, but for defensive situations. We will see how the key difference between offence and defence is in who has the initiative, you or the enemy. Chapters four and five provide a deeper look at three key principles of war, respectively the principle of the objective and the linked principles of mass and economy. I consider these to be particularly applicable in business, because everyone needs to know where they are going (objective), and there are never enough resources to do everything you want to do (mass and economy). Chapter six is a primer on military decision-making and planning, and how they can be applied to business situations. This chapter will also include a discussion of military notions of uncertainty, friction, and risk, because I have found in my consulting practice that this is an area that needs to be considered much more than it usually is. Chapter seven describes the most relevant concepts of military intelligence and how they can be applied in competitive business situations. Chapter eight examines the key concepts of military logistics and other technical aspects of warfare and how they can be applied in business. Chapters nine and ten close out the book, and examine morale, cohesion, motivation, and leadership from a military standpoint and their application to business and organizations in general. The final section in chapter 10 provides a list of ten principles of military leadership, along with diagnostic questions for each one and some techniques for building skills in those areas.

Throughout the book, each chapter will include examples from military history, personal anecdotes, business examples, and explanation of the key military concepts and how they should be applied to business problems and situations. I will also include exercises and diagrams that help business executives, managers, and entrepreneurs apply these concepts and tools to their own reality. Finally, each chapter includes a number of highlighted 'Brilliant Manoeuvres' that encapsulate the lessons of military wisdom to win business battles.