

Report Date: 19 Sep 2012

**Summary Report for Individual Task
150-000-1005
Conduct Soldier and Leader Engagement
Status: Approved**

DISTRIBUTION RESTRICTION: Approved for public release; distribution is unlimited.

DESTRUCTION NOTICE: None

Condition: The soldier, has received an operations plan, or warning, operations, fragmentary, or other tasking order from higher headquarters and is exercising mission command. The commander has issued guidance on Conduct Soldier and Leader Engagement . The individual has established communications with applicable individuals and units, and higher headquarters. The mission command networks, information systems, integration procedures, and facilities and equipment are operational and processing information in accordance with standard operating procedures. This task can be performed during all hours or limited visibility in various environment conditions. The individual has received guidance on the rules of engagement and other operational criteria. Some iterations of this task should be performed in MOPP.

Standard: The individual conducts Soldier and Leader Engagement IAW FM 3-13.

Note: Task steps and performance measures may not apply to every staff, unit or echelon. Prior to evaluation, coordination should be made between evaluator and the evaluated staff or units' higher headquarters to determine the performance measures that may not be evaluated.

Special Condition: None

Special Standards: None

Special Equipment:

Safety Level: Low

MOPP: Sometimes

Task Statements

Cue: None

DANGER

Leaders have an inherent responsibility to conduct Composite Risk Management to ensure the safety of all Soldiers and promote mission accomplishment.

WARNING

Composite Risk Management is the Army's primary decision-making process to identify hazards, reduce risk, and prevent both accidental and tactical loss. All soldiers have the responsibility to learn and understand the risks associated with this task.

CAUTION

Identifying hazards and controlling risks across the full spectrum of Army functions, operations, and activities is the responsibility of all Soldiers.

Remarks: Task content last updated:

Notes: None

Performance Steps

1. Plan the Soldier and Leader Engagement (SLE).
 - a. Review approved command messages and themes.
 - b. Review audience, subject, past meeting, and security background material.
 - c. Develop desired Measures of Effectiveness (MOE) and Measures of Performance (MOP).
 - d. Facilitate meeting particulars to include:
 - (1) Establish agenda
 - (2) Determine time and location of meeting.
 - (3) Security considerations.
 - (4) Invitations.
2. Conduct the introduction using key considerations.
 - a. Position self next to key designated individual.
 - b. Establish rapport with the target audience.
 - c. Introduce and greet everyone in the party and record the names and positions of everyone in attendance.
 - d. Follow the norms that are provided by the local culture and customs during the introduction.
 - e. Apologize in advance for any cultural mistakes made.
 - f. Transition from the introduction step to the business step slowly.
3. Conduct business meeting to focus on main engagement.
 - a. Avoid making promises that cannot be kept.
 - b. Use open-ended questions to facilitate discussion.
 - c. Address all talking points relevant to the engagement.
 - d. Focus on avoiding or overcoming impasses and working towards the anticipated Zone of Possible Agreement (ZOPA).
 - e. Have a planned signal with others for any situation where the spokesperson may need to break from the engagement.
4. Conduct post business agenda.
 - a. Review what has been agreed upon and clarify expected actions by both parties.
 - b. Agree upon a general date for a follow-up engagement if required.

c. Take a photo with the engagement target as needed.

5. Conduct de-brief with the G/S-7 as soon as possible following the engagement.

6. Submit engagement reports to capturing important information from an engagement that needs to be shared with other commands or staff sections. To include the following:

a. Reporting unit with contact information.

b. Engagement target name, demographic data, and location.

c. Known affiliations and personality links of the engagement target.

d. Purpose for the engagement.

e. Background of the engagement and synopsis of previous engagements.

f. Attendees.

g. Summary of the engagement outcome and duration.

h. Initial assessment of success in reaching intended outcome.

i. Agreements made or open issues that require coordination.

j. Date, time group and location of agreed follow up meeting (if required).

(Asterisks indicates a leader performance step.)

Evaluation Preparation: Brief the soldier: Tell the Soldier he will be evaluated on his ability perform the staff function in the unit. Go over the materials needed to perform this task. Review the task standards. Stress to the Soldier the importance of observing all cautions and warnings to avoid injury to personnel and, if applicable, damage to equipment.

PERFORMANCE MEASURES	GO	NO-GO	N/A
1. Planned the Soldier and Leader Engagement (SLE).			
a. Reviewed approved command messages and themes.			
b. Reviewed audience, subject, past meeting, and security background material.			
c. Developed desired Measures of Effectiveness (MOE) and Measures of Performance (MOP).			
d. Facilitated meeting particulars to include:			
(1) Established agenda.			
(2) Determined time and location of meeting.			
(3) Security considerations.			
(4) Invitations.			
2. Conducted the introduction using key considerations.			
a. Positioned self next to key designated individual.			
b. Established rapport with the target audience.			
c. Introduced and greeted everyone in the party and record the names and positions of everyone in attendance.			
d. Followed the norms that are provided by the local culture and customs during the introduction.			
e. Apologized in advance for any cultural mistakes made.			
f. Transitioned from the introduction step to the business step slowly.			
3. Conducted business meeting to focus on main engagement.			
a. Avoided making promises that cannot be kept.			
b. Used open-ended questions to facilitate discussion.			
c. Addressed all talking points relevant to the engagement.			
d. Focused on avoiding or overcoming impasses and working towards the anticipated Zone of Possible Agreement (ZOPA).			
e. Had a planned signal with others for any situation where the spokesperson may need to break from the engagement.			
4. Conducted post business agenda.			
a. Reviewed what has been agreed upon and clarify expected actions by both parties.			
b. Agreed upon a general date for a follow-up engagement if required.			
c. Took a photo with the engagement target as needed.			
5. Conducted de-brief with the G/S-7 as soon as possible following the engagement.			
6. Submitted engagement reports to capturing important information from an engagement that needs to be shared with other commands or staff sections. To include the following:			
a. Reported unit with contact information.			
b. Engagement target name, demographic data, and location.			
c. Known affiliations and personality links of the engagement target.			
d. Purpose for the engagement.			
e. Background of the engagement and synopsis of previous engagements.			
f. Attendees.			
g. Summary of the engagement outcome and duration.			
h. Initial assessment of success in reaching intended outcome.			
i. Promises made.			
j. Date, time group and location of agreed follow up meeting (if required).			

Supporting Reference(s):

Step Number	Reference ID	Reference Name	Required	Primary
	FM 3-13	INFORMATION OPERATIONS: DOCTRINE, TACTICS, TECHNIQUES, AND PROCEDURES	Yes	Yes
	FM 7-15	The Army Universal Task List	No	No

Environment: Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT.

Safety: In a training environment, leaders must perform a risk assessment in accordance with FM 5-19, Composite Risk Management. Leaders will complete a DA Form 7566 COMPOSITE RISK MANAGEMENT WORKSHEET during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW FM 3-11.4, NBC Protection, FM 3-11.5, CBRN Decontamination.

Prerequisite Individual Tasks :

Task Number	Title	Proponent	Status
150-000-0000		150 - Combined Arms (Individual)	Analysis
150-IIA-1034	Plan Soldier and Leader Engagement	150 - Combined Arms (Individual)	Approved
150-000-0000		150 - Combined Arms (Individual)	Analysis

Supporting Individual Tasks : None

Supported Individual Tasks :

Task Number	Title	Proponent	Status
150-IIA-1034	Plan Soldier and Leader Engagement	150 - Combined Arms (Individual)	Approved

Supported Collective Tasks :

Task Number	Title	Proponent	Status
71-8-5311	Conduct Soldier and Leader Engagement (Brigade - Corps)	71 - Combined Arms (Collective)	Approved