



# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES





# PERFORMANCE EXPERT EMBEDMENT

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# PERFORMANCE EXPERT EMBEDMENT

## EMBEDDED PERFORMANCE EXPERT PILOT— QUALITY IMPROVEMENT EVALUATION

### **METHODOLOGY**

- As part of the Army Resilience Directorate's (ARD's) Suicide Prevention Pilot, ARD established the Embedded Performance Expert (EPE) Program embedding PEs at the BDE and BN levels.
- The Research Transition Office (RTO) at the Walter Reed Army Institute of Research (WRAIR) was tasked with conducting a quality improvement evaluation of the pilot from 2019-2023.
- The purpose of WRAIR's Embedded Performance Expert—Quality Improvement Evaluation (EPE—QI), an exploratory evaluation, is to determine:
  - How EPEs prioritize their time to achieve unit goals
  - How the relationship between EPEs and their units influence the productivity of their work
  - How to determine consultant (EPEs) effectiveness
  - Define what “embedment” can mean
- This handout summarizes some of the best practices and lessons learned from 104 leader interviews and 62 EPE 6-month and transition interviews conducted across six locations.
  - Ft. Bliss
  - Ft. Campbell
  - Ft. Carson
  - Ft. Cavazos
  - South Carolina Army National Guard (SCARNG)
  - United States Army Garrison Italy (Vicenza)





# PERFORMANCE EXPERT EMBEDMENT

**BEST PRACTICES: SUCCESSFUL PEs  
HAVE BEEN ABLE TO...**

## **BE PERSONABLE AND PRACTICAL**

- Build rapport with leaders and Soldiers.
- Take personal initiative.
- Communicate capabilities.
- Be a vocal contributor.
  - Speak honestly and clearly
- Understand that being rejected or ignored can be part of the job. This may happen because leaders are busy, they do not understand your capabilities, or you have yet to demonstrate your effectiveness.
  - Engage with your PCM or other PEs to brainstorm ways to overcome these obstacles.

## **BE MENTALLY PREPARED**

- PEs are the SMEs—be confident and demonstrate competence in the delivery of psychological skills and concepts.
- Know when to step in and coach in the moment.
- Know when to speak up (or not) in meetings.
- Practice what you preach—set and achieve goals related to mental and physical fitness and nutrition.
- Your professional appearance matters. Some leaders and Soldiers judge your capabilities based on the “eye test”.



## **TRANSLATE LANGUAGE**

- Translate academic language into Army language.
- Use Army language to describe mental skill application.
- Rely on previous military experience or time spent training Soldiers and observing field exercises.



## **BE A PROBLEM-SOLVER**

- Frame unit concerns in terms of how or if psychological skills training can correct it. Share this with leaders.
- Ask leaders their unit challenges and then provide recommendations rather than a menu of classes you can teach.
- Take a problem set and develop a plan to address it.
- Be open-minded.
- Provide practical solutions.







# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: WHERE TO EMBED

### GO WHERE THE TRAINING IS WANTED

Division – Brigade – Battalion – Company – Platoon – Individuals

Most training and interactions occur at the BN level and lower.

#### PEs EMBEDDED AT BDE:

- Attended BDE-level meetings
- Worked primarily with senior leaders
- Conducted training with senior leaders
- Interacted with junior Soldiers minimally
- Primarily worked at the BN level
- Mentored BN PEs
- Coordinated cross-section trainings across BNs (e.g., Leader Development Course, Squad Leader Development Course)



#### PEs EMBEDDED AT BN:

- Were noticed by the Soldiers regularly
- Built rapport with leaders and Soldiers more easily
  - Attended PT sessions, trainings, field exercises
  - Walked the motor pool, Company Operations Facility (COF), etc.
  - Chatted with Soldiers regularly





# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: WHO TO KNOW

### LEADERSHIP AT EACH LEVEL (BN AND LOWER)



- BN “Top 5” (CDR, CSM, XO, S-3, Operations SGM)
  - Meet with them first
  - Discuss the command priorities and current problem sets
- CO leadership
- PLT leadership

### UNIT CONNECTIONS TO MAKE



- Potential collaborators
  - Clinical psychologist
  - Behavioral Health Officer (BHO)
  - Chaplain
  - Master Fitness Trainer (MFT)
  - Master Resilience Trainers (MRTs)
  - H2F personnel
- Facilitators
  - S-3
  - XO
  - “R2 Team”
    - 1LT and 2LT in BN HQs helped the unit coordinate with the PEs
  - AGR Personnel (National Guard and Reserve)
    - Training NCO

### APPLIED EXAMPLE: LETHALITY ENHANCEMENT TEAM



At the encouragement of a BDE CDR, PEs teamed up with the above collaborators to train psychological, physiological, and spiritual aspects of lethality and then used simulators so Soldiers could practice implementing psychological and physiological skills.







# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: WHAT TO DO—INITIALLY

### INITIAL MEETINGS WITH BN LEADERS



- Understand the priorities and philosophy of BN CDR and CSM and how your work may support and reinforce these goals/outcomes.
- Know the unit mission and understand the MOS-specific demands of the unit.
- Describe your previous performance-related work and expertise (e.g., MLB, Ironman triathlete).
- Based on unit or Army trends, provide short-term plans for quick wins and early buy-in.
- Consider including your PCM in initial meetings.
- Understand that BN leaders can provide introductions, but may not direct their COs to use PEs.
  - You have to sell your capabilities to CO and PLT leadership
  - You may have to be persistent and assertive because you are an optional asset
- Provide an initial capabilities brief to BN and CO leadership.
  - Make sure leaders know your range of capabilities
    - Provide a site-specific portfolio including storyboards/case studies to help paint the picture of your capabilities (e.g., performance, resilience, leader development, team cohesion, bystander intervention, academic performance)
    - Inform leaders where you can train (e.g., classroom, field)
    - Know your audience
      - Officers tend to think conceptually—they have had less time in a CO
      - NCOs tend to think more practically and may not see a need for you—they have had more time in a CO
    - Request current metrics from CDRs
      - Knowing what the unit measures gives insight into what is important
      - Standard metrics include APFT/ACFT and marksmanship scores
      - Some units are metric-heavy so this should help with determining your effectiveness
      - Request DEOCS trends
    - Request to attend training meetings in order to prevent conducting only last-minute, standalone trainings
      - Determine how to integrate your capabilities with their training calendar
- Collaborate with PLs and PSGs—they don't have as many assets and resources as their leaders, so you could be great enablers at this level.







# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: WHAT TO DO—INITIALLY (CONTINUED)

### INITIAL MEETINGS WITH LEADERS (cont.)

- Have an “elevator speech” and information sheets ready.
- Conduct a PT capabilities brief to showcase skills in an applied way.
  - This brief can be done with any level of leadership—officers and/or NCOs
  - If this brief is done with the S-3 section, it will provide ways for junior officers to use you when they take a leadership position
- Provide business cards with your contact information.
- Request contact information from leaders, including the optimal way to communicate with each leader (e.g., text, call, email, face-to-face visit).
- Request to be part of newcomers’ briefs.
- Ask to attend Leaders’ (Sergeants’) Time Training, if it’s scheduled.
- Provide a summary and a plan of action after the initial meeting.

### INTERACTIONS WITH SOLDIERS

- Build rapport.
  - In informal settings (e.g., in the COF, before PT)
    - You should:
      - Introduce yourself, explain what you do, share where your office is
      - Center the conversation on the Soldiers (e.g., ask about their job, Families, pets, hobbies, favorite sport teams, other duty stations)
      - Sprinkle in similarities or differences (e.g., both from the same state, love/hate for a specific athletic team)
      - Bring baked goods or candy, if you want
  - In formal settings (e.g., at a training)
    - Introduce yourself, explain what you do, share the purpose of the training you are providing, and communicate how it connects to the Commander’s priorities at every training
    - During the debrief or AAR, re-explain the “why” of the training/coaching the PEs provided and help the Soldiers consider skill/concept transfer to other parts of their job or personal life







# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: WHAT TO DO—ONGOING

### INTERACTIONS IN MEETINGS AND TRAININGS

- Observe and take notes.
- Be prepared to speak.
- Try to set up recurring meetings with the Top 5 every four to six weeks to discuss trends, engagements, plans, and feedback.
- Provide suggestions for how your capabilities can integrate into large training exercises or other events.



### AT THE RANGE OR IN THE FIELD

- Demonstrate your commitment to learn about their jobs and equipment by seeing them in action.
- Seek out opportunities to go to the range and field with the unit.
- Have an agreed-upon purpose with unit leaders for going to the range/field to prevent “taking a walk in the woods”; observation and learning are important purposes.
- Be curious about what the Soldiers are doing.
- Coach Soldiers on how to reduce stress during qualifying events.
- Walk lanes with leaders with the goal of increasing leaders’ confidence.
- Know the best way to protect yourself from potential wildlife and wilderness hazards (e.g., ticks, chiggers).



### SHOW RESULTS

- Provide feedback to leaders, both verbally and in writing.
  - Connect engagements directly to the commander’s priorities
- Craft storyboards to showcase work, including leader quotes, pictures, and performance outcome improvements.
- Examples could include STX lanes, live fire exercises, and other training opportunities.
- Use historical data.
- Compare groups.





# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: WHAT TO DO—ONGOING (CONTINUED)

### **INTERACTIONS WITH SOLDIERS**

- **Build rapport while seeking other opportunities to reinforce psychological concepts/skills.**
  - **Approach Soldiers and chat with them (demonstrate care)**
  - **Approach and ask them about their professional goals**
  - **Provide support**
    - **Academic Performance Training material if they are going to a school**
    - **Mastery sessions for weight loss or smoking cessation**
  - **If a Soldier shares clinical issues with you, help that Soldier get to a chaplain, BHO, EBH, etc.; follow up with the Soldier and support them within your professional lane**
- **In informal settings (e.g., at PT, at a range)**
  - **Chat during down time (if appropriate)**
  - **Opportunities for hip pocket training arise when you are present**
  - **During the AAR (i.e. PE sandwich):**
    - **Leaders talk**
    - **You speak and reinforce what the leaders said adding psychological skill and concept considerations**
    - **Leaders conclude AAR**
- **In formal settings (e.g., at a training)**
  - **As new Soldiers are always joining the unit, you should continue to introduce yourself, explain what you do, and share the purpose of the training you are providing**
  - **During the debrief or AAR, re-explain the “why” of the training/coaching you provided and help Soldiers consider skill/concept transfer to other parts of their job or personal life**







# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: WHAT TO DO—ONGOING (CONTINUED)

### APPLIED EXAMPLE: EXPERT COUNSELING COURSE



At the request of a BDE CDR, collaborate with unit leaders (officers and NCOs, depending on the audience), the chaplains, and other unit personnel to provide the Expert Counseling Course. Officers or NCOs of the same rank attended this three-day course to learn about communication and the different forms of counseling, practice counseling, and receive feedback from a leader on practice counselings.

### ALWAYS BE PREPARED

- Talk to Soldiers and then be prepared to teach/coach/mentor based on the conversation.
- Visuals can be useful during training.
  - Carry a small whiteboard or paper to illustrate an example to help Soldiers visualize concepts

### APPLIED EXAMPLE: RESOURCE CARD

#### Myths about Sleep

*"My body has just adapted to lack of sleep!" "I perform better when I am tired"*  
*"Sleep is for the weak"*

Research shows that performance significantly decreases with less than 7-8 hours of sleep after just the first day.

#### IMPACT OF SLEEP DEBT

##### Increases:

Negative emotions  
Risk for depression  
Risk for illness/injury  
Body weight

##### Decreases:

Moral judgment  
Memory formation  
Information processing  
Accuracy of performance  
Ability to cope  
Motor control  
Reaction time

#### Maximize your Sleep

1. Caffeine and alcohol consumption before bed affect the quality of the sleep you get.
2. Make sure your room is dark and cool. Our bodies need the right environment to be able to recover.
3. Stick to a sleep schedule, being consistent allows our bodies to maximize our recovery.



#### Napping as a Strategy

Naps can be great ways to recover energy quickly. Be sure to keep naps under 45 minutes to maximize results.

*Provide a laminated pocket-sized resource card with highlights of concepts and skills you've taught.*





# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: WHAT TO DO—ONGOING (CONTINUED)

### HELPFUL TIPS

- Determine the linchpins—oftentimes, you need one leader to work with you, and word will spread about your capabilities and ease of use.
- Offer mastery sessions for leaders and Soldiers.
- Make the leader tell you “no” rather than allow them to ignore or forget about you.
  - When trying to get time on the unit's calendar, rather than saying "call me if you'd like some training", take a more direct approach and volunteer to take a specific LTT/STT or LPD time slot



### MEDIA

- Create materials (e.g., flashcards, laminated information) to help Soldiers overcome reoccurring stressors or to assist with academic performance training.
- Display visuals (e.g., printed advertisements) on the walls.
- Use social media (e.g., Facebook, Instagram, Twitter) to share the work being done in the unit with the PEs and tag the unit.
- Contribute to the unit newsletter or installation newspaper.







# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: WHAT TO DO—ONGOING (CONTINUED)

### **META-COACHING**

- Build capacity through meta-coaching as force multiplication.
  - While you may not see your immediate impact, meta-coaching leaders extends the reach and reinforcement of your capabilities
- Assist leaders (e.g., MRT, Master Gunner, MFT) in providing feedback and/or reinforcement related to real-world application of principles, skills, and methods (e.g., instruct the leader on how to more effectively provide feedback to the Soldiers).
- Helpful tips:
  - You cannot be present at all times; working with leaders empowers them to step in and help their Soldiers directly
  - Inform leaders what you are looking for so the leaders understand your thought process
  - In a one-on-one setting, offer leaders suggestions of questions to ask during an AAR that will elicit better feedback or conversation

### **COACHING**

- Provide feedback and/or reinforcement related to real-world application of principles, skills, and methods (e.g., provide instant feedback to the Soldier).
- Leverage mastery sessions with senior leaders to demonstrate capabilities, increase buy-in, and maintain connection.
- Helpful tips:
  - Coach Soldiers directly to build rapport and create momentum; you are also able to model coaching for leaders too
  - Be present to coach—coordination with the S-3 section and unit leadership is critical

### **TEACHING**

- Transfer new knowledge of principles, skills, and methods (e.g., classroom training, hip pocket training).
- Helpful tips:
  - Ask the S-3 to publish an OPORD or tasker for classes to increase attendance, because time can be difficult to confirm
  - Utilize informal teaching time prior to events or during AARs
  - Be proactive during the “hurry-up-and-wait” time and engage with leaders and Soldiers
  - Make notes on your phone of the key concepts and skills you teach as a reference tool





# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: WHEN TO WORK

### **NOT A REGULAR 9-5 JOB**

- Make time to build relationships
  - Expect early days (e.g., PT)
  - Expect long days (e.g., ranges, FTX)
- Expect schedules to change at the last minute.
- Expect harsh weather and austere field conditions.

### **BE WHERE SOLDIERS ARE**

- Ranges and field exercises
- Motor pool
- DFAC
- PT
- COF



### **MEETING ATTENDANCE**

- Relevant, useful and practical meetings (e.g., BDE, BN, CO, SFRG).
- These meetings inform you about:
  - Leader priorities
  - Training exercises
  - Changes to the schedule
  - Potential collaborators
  - Challenges within the unit or subunits

### **HELPFUL TIPS**

- Know who is creating the calendar and get on that distribution list.
- Combat burnout; practice self-care.
- Prioritize most impactful unit engagements.
- Consider training Tuesday-Thursday so you have Monday and Friday to prepare trainings and attend meetings.
- Update PCM if you have an irregular schedule (e.g., 0600-1400) so you can set boundaries.
- Soldiers (and leaders) recognize if you are making the effort to have similar experiences to understand Army jobs.







# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: HOW TO BE EFFECTIVE



### **KNOW THE S-3**

- Having an office/desk in the BN S-3 office has been beneficial for PEs; however, make sure to get out of the BN HQs to be seen by the Soldiers, as well.
- Ask the S-3/leaders to publish OPORDs for the PE-led trainings when the Commander has agreed.



### **RANGE PASSES**

- If range passes are required, determine the process and how to be most effective (e.g., group versus individual passes, pass for a range of dates versus individual dates).
- Work with your PM and PCM to obtain a TMP from division to eliminate the issue of range passes.



### **EQUIPMENT AND RESOURCES**

- Having easy access to equipment/resources is beneficial.
  - PT (including several sets of ACFT equipment)
  - Protective gear (e.g., field gear)
  - emWave
  - Access to classrooms and alternate workout locations





# PERFORMANCE EXPERT EMBEDMENT

## BEST PRACTICES: HOW TO BE EFFECTIVE (CONTINUED)

### WITH FELLOW PEs

- Support their trainings.
- If junior PEs are shadowing more experienced PEs, have them see day-to-day operations, engagements, and interactions.
- An ongoing group text can be useful to communicate changes quickly.



### PE TRANSITIONS

- Inform the unit that you are leaving.
- If possible, provide feedback for the selection of your replacement.
- Encourage the replacement PE to shadow you immediately.
- Ensure warm hand-offs with formal and informal leaders.
- Set up replacement PE with means of communication (e.g., distro list, group messages, phone numbers on a spreadsheet).
- Share the work you have done (e.g., plan of action, past emails, progress made, classes taught to units, storyboards).
- Walk the COF with the replacement PE.

