

WHITE PAPER
TEN PROVEN MILITARY STRATEGIES FOR BETTER
RESOURCE PLANNING: AVOIDING CUSTER'S LAST STAND

A Planview White Paper
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Background

Though many insightful books and articles have been written on management lessons from history's greatest leaders, it is also true that not all military lessons apply to business. After all, business and war have much different stakes. Yet, some lessons and principles ring equally true across both domains.

Resource planning, a perennial challenge in business, is a perfect example. According to numerous surveys, organizations cite resource management at the top of their list of barriers to successful value delivery. They have limited resources, and struggle with how to use them effectively and efficiently across an ever-growing and ever-changing influx of demand.

Nowhere is there a richer source of strategies and tactics for how to apply limited human resources than in military history. With that in mind, this paper explores 10 timeless military strategies—tried and tested over thousands of years—that can be effectively applied toward modern day resource planning. They are:

1. Divide and Conquer
2. Concentration of Force
3. Economy of Force
4. Raiding
5. Fortification
6. Delay
7. Reinforcements
8. Allies
9. Unity of Command
10. Retreat

In the case of General Custer, the U.S Civil War general, whose ill-fated mission at the Battle of the Little Bighorn was a recipe for failure, we can learn from the principles he *didn't* observe, as well as the ones his enemies did. Thus, we will begin with some lessons from this battle, and then explore the ten proven strategies and principles and how they can help today's organizations make sense out of the complexities of resource management.

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I. General Custer and Why He Lost

Background:

Custer's Last Stand, otherwise known as the Battle of the Little Bighorn, has almost become synonymous with failure. The year was 1876, and Custer was part of an army campaign to force Native American tribes off the gold-rich lands in South Dakota's Black Hills.

He'd been warned that the territory was well defended by thousands of Sioux and Cheyenne Indians (as they were called at the time, thanks to the early European settlers in the New World mistakenly believing they were in India).

Instead of planning a surprise attack or waiting for reinforcements as he was ordered, he decided to charge full speed ahead with all his troops toward the Little Bighorn River, in what is now Montana. As could be expected, they were easily defeated, with Custer and all 265 men in his regiment losing their lives, save for a sole half-Indian scout.

Lessons in Resource Management:

What can we learn from this about resource management? On the surface, the failure lesson seems obvious: *Don't go fool-heartedly into a sure failure where you're grossly understaffed and all the odds are against you* (a mistake organizations seem to make on a regular basis). But as we dig deeper, there's more to this story.

Leading up to this event, Lakota holy man Sitting Bull had gathered an unprecedented meeting of Cheyenne, Sioux, Arapaho, and other tribes. He'd convinced them to set aside their differences and work together. As you'll see in our ten strategies, allies can make all the difference between success and failure.

In addition, Custer didn't understand the terrain he'd be dealing with, nor did he believe the extent to which he was outnumbered. He was told to wait for reinforcements, but he ignored his orders. To add insult to injury, he split his troops into three units, sending one detachment south to prevent the enemy from escaping up river. Another unit was sent to draw the enemy out and force them to set up a defensive line. And Custer took a third unit north.

Thus he had 265 men split into three groups facing thousands of united warriors. Not a good strategy by any definition. Yet organizations do this all the time, dividing their resources to take on an overwhelming flood of work, virtually assuring that none of the initiatives will end on time or successfully.

There's a difference between boldness and foolishness, and a fine line between bravery and stupidity. Indeed, if Custer had observed our list of ten strategies, his name might have been associated with something other than heroic failure. To avoid this same fate, let's take a look at these ten strategies in more detail.

II. Ten Proven Strategies for Resource Management Success

How can your organization avoid Custer's fate when planning resources across your initiatives? Here are ten proven military strategies to consider:

- 1. Divide and Conquer** – The aim here is to have a smaller foe to conquer by luring them to divide their army in half, and then attacking one group at a time. The trick is to do this without diluting our own forces. In business, we can do this by addressing an overwhelming set of projects, or the scope of a large project, in a piecemeal fashion. In other words, you're dividing the target (in this case, the work), not your own forces. Many people mistakenly use the term "divide and conquer" to divide their own forces toward multiple efforts in a feeble attempt to take on insurmountable odds. The only one you're going to conquer by dividing your own forces is yourself, which takes us to another military maxim: Never fight a war on two fronts.
- 2. Concentration of Force** – Concentration of force is the act of applying an overwhelming number of forces toward a strategic portion of the opposing force. We can apply this approach by focusing a proportionately large number of our resources on a select few primary objectives. Studies have shown that project throughput actually increases when excessive multitasking is avoided. As an example, it is usually quicker to stagger activities between Project A, Project B, and Project C, than it is to attempt all three simultaneously. Focused attention is the key to productivity.

- 3. Economy of Force** – The concept of Economy of Force, used today by military strategists around the world, was first articulated by Prussian general Carl Von Clausewitz in his landmark book, *On War*, based on principles employed by Napoleon. The idea is that a *maximum effective amount* of resources should be applied to primary objectives, and a *minimum effective amount* should be applied to secondary objectives, with any reserves being used strategically.

In other words, no resources should be wasted, and the majority should be applied to the most value-producing work. Secondary objectives (which, in an organization, might be small initiatives or “keep the lights on” work) should be minimized, and those undertaken should be given the minimal amount of resources to remain effective, no more, no less. This value-based and efficient approach is a good model for applying strategic use of resource capacity in any organization.

- 4. Raiding** – Similar to splitting the opponent’s forces, the aim is to make the enemy weaker, in this case by raiding their supplies or provisions. If we look at excessive demand as “the enemy,” we can begin to think of ways to reduce it to a more manageable size, either by taking on less work, scrutinizing and prioritizing the intake of work, or limiting the scope of the work we’re taking on. Think of it as “raiding the demand list” to make it smaller.
- 5. Fortification** – Armies build forts to protect themselves. In business, we want to protect our resources as well, and the best way to do that is to protect their availability. If we have a clear picture of our resources’ true availability, after all the time-off, administrative work, and unplanned or ongoing work has been estimated, we will protect them from being overbooked, overused, and burnt out. Resource fortification is an underused strategy.
- 6. Delay** – If you can’t defeat the enemy, delay them. This strategy has been employed countless times, most famously at Waterloo, when Napoleon sent a small number of troops to delay the incoming Prussians while his main body of troops faced the British and Dutch troops. Unfortunately, the men he sent to delay the Prussians were led by a strategically blind general, who delayed his own troops instead, missing the Prussians by miles and allowing them to join with the British.

There are two lessons here. First, if you’re faced with an overwhelming list of projects, find out which ones can be delayed until you have the resources to undertake them. Or at least have someone (competent) do preliminary legwork on those extra efforts while you focus the bulk of your resources on the immediate needs. This may give you a fighting chance to complete the most important projects first. Second, when you do get resource commitment, take advantage of the time and break down any barriers that are distracting from the work getting done. Otherwise, you’ll waste what is usually a narrow window of opportunity.

- 7. Reinforcements** – General Custer was ordered to wait for reinforcements. But he ignored those orders and used a failed strategy to undertake a futile effort against insurmountable odds. In their impatience, whether under pressure from senior management or whether it’s a case of wishful thinking, many organizations make the same mistake. “Reinforcements” doesn’t only apply to additional staff; it can also apply to building necessary skills, delivering adequate training, providing the right tools, or anything that will help the resources be successful. This was a key strength of the Roman army, Napoleon’s army, and all great armies throughout history.

One caveat is that sometimes bringing in additional people only serves to increase the risk by adding extra communication channels and confusion. And, sometimes, more hands don’t lead to more productivity. As Frederick Brooks, author of *The Mythical Man-Month*, said, “Nine women can’t make a baby in one month.” But if used wisely, and in conjunction with the other principles, bringing in reinforcements is a powerful approach.

- 8. Allies** – The concept of using allies is simple: Attack using the strength of another. Custer lost because Sitting Bull was able to get warring tribes to look past their differences and unite toward a common cause. In organizations, allies can include stakeholders, suppliers, customers, consultants, internal champions, and all sorts of people who can serve to “grease the wheels.” The more people who are passionate and on board with what you’re trying to do, the easier it will be to get the tumbleweed to roll downhill.

Again, there is a caveat. In his infamous and ill-fated invasion of Russia in 1812, Napoleon had assembled the largest coalition known to man. Some forty countries were on board with his mission, as some strong democratic ideals were at stake. But were they really on board? Or was it like the proverbial ham and eggs dinner, where the chicken is involved but the pig is totally committed? Indeed, Napoleon’s mission failed because of a nasty combination of unpredictable weather and disjointed leadership. His coalition wasn’t bound by the same level of passion, commitment, and most of all, leadership principles. It’s something to watch for when including suppliers and outside consulting companies in your initiative. Agreed-upon principles and standards can go a long way.

- 9. Unity of Command** – When his superiors offered him another experienced general to co-lead a mission for “increased chances of success,” Napoleon declined, saying “It’s better to have one bad general than two good ones.” He knew from experience

that multiple leaders can sometimes disagree and give conflicting directives, leading to confusion and delay. This happens in organizations all the time. Multiple stakeholders or “co-project leaders” don’t necessarily agree on goals or tactics; one customer has one objective while another has an entirely different goal; or individual managers have their own agendas that aren’t in alignment with one another.

Any of these situations can derail your plans and negatively impact resource productivity. The lesson is: Make sure stakeholders and managers are aligned in terms of goals, objectives, strategies, and tactics. And in the case of co-leaders, have a clear process for who has the ultimate decision in the event of conflict.

10. Retreat – There is an ancient Chinese military saying, “There are only thirty-six strategies under the sky.” In line with this, they have thirty-six proverbs that are rooted in battle folklore and which support themes ranging from *dealing with enemies* to *managing chaos* to *handling desperate times*. The 36th strategy, according to their list, is: “If all else fails, retreat.”

In modern organizations, when resource constraints are leading to project delays, after you’ve considered: adding resources; shifting resources; delaying projects; staggering activities; refining scope; and other strategies (all of which carry their own risk), sometimes the only solution is to retreat. Either terminate the projects that can’t be undertaken, terminate those that are less valuable, or wait until you have the resources to accomplish what you want. And above all, don’t be afraid to terminate a project midstream if it won’t provide the relative value it needs to. Sunk costs are never a good indicator of future value. Or as a Turkish proverb says, “No matter how far you’ve gone on a wrong road, turn back.”

In the end, it is clear that the same mistakes Custer made over a century ago are prevalent in organizations today. And it’s equally clear that the proven, timeless strategies that have helped everyone from the ancient Chinese to the Native Americans to Napoleon Bonaparte are as relevant today as they were then.

Collectively, these ten strategies can help today’s organizations avoid all-too-common pitfalls, while better prioritizing demand and making more effective use of valuable and constrained resources. Many leaders today feel the answer is to take on everything that’s sent their way and just have everyone work harder, work more, or react faster. They think that’s a strategy for success. Thousands of years of history says otherwise.

III. Further Reading

To learn more about better resource planning for your organization, choose from one of the following materials:

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[The Capacity Quadrant: 4 Keys to Demystifying Resource Management](http://www.planview.com/CapQuad/)

(<http://www.planview.com/CapQuad/>)

By Jerry Manas, Senior Editor, Planview

Are you making the best use of your limited resources? Find what you can do to make more efficient use of your limited resources, gain a clearer picture of capacity and demand, and overcome the complexities of resource management for better staffing and funding decisions, increased productivity, and, ultimately, delivering higher value.

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[Uncommon Sense Resource Planning: 11 Tips](http://www.planview.com/UncommonSense/)

(<http://www.planview.com/UncommonSense/>)

Read on for eleven un-common sense tips that will help you maximize your valuable resources.

SOLUTION BRIEF

[Planview Enterprise for Resource Management](http://www.planview.com/ResourceManagementSolution/)

(<http://www.planview.com/ResourceManagementSolution/>)

Discover how Planview Enterprise can help you optimize resource performance for every project and portfolio across your enterprise.

IV. About Planview Enterprise

Planview Enterprise® is Planview's market leading solution for end-to-end portfolio management, from ideation through operational planning, execution, and value delivery.

All Planview solutions are integrated with proven best practices to help you build process maturity and maximize your return on investment. These adaptive best practices deliver a roadmap to success, providing process maps, document templates, tips and techniques, and more, all based on our cutting edge research.

Planview offers portfolio management solutions that help organizations embrace change by bridging the gaps between strategy, Finance, and operations. Through unique use of portfolios, Planview integrates ideation, strategy, investment planning, execution management, and Finance in order to provide a crystal-clear picture of value delivery at all levels of the organization.

With this holistic, integrated, and portfolio-driven approach, Planview can help you and your organization embrace change, create unity, and thrive in an environment that's defined by change.

To learn more about the comprehensive solutions Planview offers, please contact Planview at:

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V. About the Author



Jerry Manas, Senior Editor at Planview, is frequently cited by leading voices in the world of business, which often reference his best-selling book, *Napoleon on Project Management*, particularly its core themes of simplicity and focus.

Throughout his career as an author, speaker, and consultant, Jerry has built a reputation for taking complex information and processes and making them clear and accessible.

His work has been highlighted in a variety of publications, including *Leadership Excellence*, *The National Post*, *The Globe and Mail*, *The Chicago Sun Times*, and *The Houston Chronicle*. He has written numerous articles and appeared on radio programs nationwide.

In *Napoleon on Project Management*, Jerry drew insightful parallels between Napoleon's strategic brilliance and success in today's organizational and business worlds. The prestigious Kirkus Reviews called it "the ultimate case study in effective project management." The book has been published in eight languages.

His book *Managing the Gray Areas*, which brought new perspectives on resolving the most common leadership dilemmas, was hailed by Pat Williams, Senior VP of the Orlando Magic basketball team, as "a new path for leaders."

Jerry collaborated with the Creating WE Institute on the bestselling book *42 Rules for Creating WE*, which reached #1 on Amazon in Leadership, Management, Motivation, and Organizational Behavior. His latest book, *Project Lessons from the Roman Empire* examines lessons in leadership and communication from the rise and fall of Rome.

Jerry is a founding member of [The Creating We Institute](http://www.creatingweinstitute.com/) (<http://www.creatingweinstitute.com/>), an international thought leadership community dedicated to fostering WE-centric practices through collaboration, research, and publishing. A prominent voice in the blogosphere, he is co-founder of the popular blog [PMThink!](http://www.pmthink.com/) (<http://www.pmthink.com/>) and a founding member of the Project Management Institute's New Media Council, which keeps abreast of trending topics.

At Planview, Jerry applies his passion and expertise to developing and evangelizing best practices in the areas of leadership, planning, execution, and value delivery. He also is focused on creating communities of practice around topics such as innovation, capacity planning, portfolio management, project management, and more. Jerry welcomes your comments and feedback. Contact him at jmanas@planview.com.



For more than 20 years, Planview has been advancing the discipline of portfolio management, helping our customers change the way they manage people and money to make better business decisions. With a singular focus on portfolio management, Planview is the only company that combines customer-driven software, unmatched domain expertise, and proven best practices to solve each customer's unique business problems. For more information, visit www.planview.com.

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