

Exec Ops (formerly called Chief of Staff)

- [Video of Matt describing the Exec Ops role \(6 min\)](#)
- [Video \(older\) of Matt describing the Exec Ops role \(5 min\)](#)

If you find that you are simply not completing the goals you set for yourself each week, or you do so, but some or many of the tasks are energy-draining, then it is time to hire an Exec Ops (formerly called Chief of Staff).

An Exec Ops has become such an effective hire for the CEOs that I coach that I now require it before coaching someone. I think it's the very first hire that you should make, whether I'm coaching you or not.

Not only does the Exec Ops ensure that your actions get done, but they are also process-oriented and can run the repetitive steps required in a sound management system. They can literally run your company for you.

Mark Organ, CEO of Influitive, gives a thorough description of [CoS best practices](#) in his First Round blog post. To me, the two priorities in creating a great Exec Ops are:

- Their background
- How you train them

There are several types of Exec Ops.

- A more junior version who does not have ambition to run a department, who only wants to support you. This person will be your super-charged personal and executive assistant.
- A more senior version who does have ambition to run a department, whether a fleshed out Exec Ops with more team members, or to move to running one of the departments in the company.
- A very senior version who has enough years of experience that other exec team members will eventually accept reporting to this person. This version will become your strategic thought-partner and help craft the future vision of the company and the product. This version can, and will want to, eventually become your COO.

Whatever type you hire first, I think that eventually you will want both a senior version (who can run a department for you) and a junior version who will remain in the Exec Ops for the long-term.

Background.

- The best Exec Ops' are highly organized, excellent communicators (both written and oral), and you simply like spending time with them (because you will be spending a lot of time with them!).
 - For the more junior version, I recommend someone who is and wants to be a personal and executive assistant. It is important that they do NOT have an ambition to run their own department or company, as you want this person to stay

in this support role for many years.

- For the more senior version, you also want them to have broad strategic business knowledge. An environment that almost always ensures these skills is several years at a top management consulting firm (Bain, BCG, and McKinsey). I am partial to Bain, as I find ex-Bain consultants also have excellent financial modeling skills (akin to those that they would have learned had they worked as an associate at an investment bank). In addition, it is nice if they have 1-2 years of experience in the tech world to be familiar with current productivity tools. But this is, IMHO, a nice-to-have, not a requirement.
- For the very senior version, you want them to have more years in a consulting firm, or years managing a team (doesn't need to be a big one) in a tech company. (i.e., 10-15 years of work experience).
 - The years of work experience don't confer any real benefit, other than the fact that psychologically it is easier for execs (who are usually in their 30s and 40s) to report to someone who is at least in their 30s.

Training.

- The key is to give your Exec Ops unfettered access to all the information that you receive. It would be best to have the Exec Ops sit beside you from morning till night, with full access to your emails, calls, meetings, etc. By seeing what decisions you make, based on what information you receive, she will soon be able to think like you, and then she can truly be an extension of you (and magic will happen).
- If you are a remote company, it is still important for your Exec Ops to sit with you in person during their training period (the first 3-6 months).
 - After that, they can shadow you remotely via a Zoom link that you leave open with screen share on while you are working on solo tasks.

After several weeks of observing, your Exec Ops can start to take tasks off of your plate. Within several months, she will be able to do all the functions that don't give you energy or that you don't have the capacity to do.

Recruiting.

The most effective recruiting tool is your social media presence. This role is essentially about enthusiasm rather than specific skills. The person is making the trade of being willing to "do your laundry" in exchange for getting to watch your life. For that, they need to be a big fan of your life. And if they are, then they most likely already follow you on social media.

Most senior candidates are not attracted to the Exec Ops role because they view it as an "assistant" role. And in many companies, it is. So, when recruiting, dispel this concern by showing the candidate that they will have full access to all the information that you do. And that is the single best training to become a CEO (or head of any department) that exists.

The pushback that I get on this role from CEOs is:

- "Won't I be perceived as an asshole that thinks she's too important to talk to people directly?"
 - *Yes. If you force people to talk to your Exec Ops before they can talk to you. Don't ever do that. Your Exec Ops can draft emails on your behalf. But don't ever allow them to be your gatekeeper (i.e., intercept emails and respond themselves). Communicate with people directly, especially when you need to say "no" or make a request.*
- "I am looking for the perfect person and can't find them."
 - *Don't wait for perfection here. Pick someone good, and have the Exec Ops start shadowing you. It's the shadowing that is most important as no one will perform on Day 1. They need to shadow you for 30 days before they have enough context to do anything. I therefore encourage you to start that 30-day clock as soon as possible.*

At first, the Exec Ops role may seem unattractive to many good candidates. That is because there are two types of Exec Ops.

- One Exec Ops is a glorified gopher. This person does not have access to the CEO's email and does not shadow her in all meetings. Instead, from Day 1, this Exec Ops does the projects that don't fall neatly into any department. While these projects are critical to the company's success, this Exec Ops role has no career plan. There is no clear transition to managing a team or a department, so this role turns off strong candidates. They perceive it as a dead-end.
- The other Exec Ops has full access. They see the CEO's email, and, in the beginning, they shadow her in all meetings. In this position, the Exec Ops sees all of the CEO's information and then quickly understands every role and function in the company. For the person in the Exec Ops role, it is the most intense CEO training that exists. Yes, the CEO will ask their Exec Ops to take as much off their plate as possible. At first, this will include simple admin tasks. But there are not very many of those. And this Exec Ops will be authorized to hire whatever support staff they need (their own EA) to complete all of these tasks. That then leaves the Exec Ops to do more significant functions over time. Many Exec Ops in this role eventually either take over the running of a department, or even the people management of the Exec Team (i.e., running the 1-1s and team meetings), making them de facto COO.
 - If you make it clear that you are offering the latter role, candidates will be far more interested.

Here is a good [perspective of the Chief of Staff role](#) (what I am now calling Exec Ops from a former CoS).

Titles.

- The more junior and middle versions of this role are likely:

- Exec Ops (or CEO Ops)
- The very senior version of this role is likely:
 - Chief of Staff

I finally received the first negative feedback on an Exec Ops hire. The Exec Ops had started doing 1-1s with all executive team members, who had shared their frustrations about the founder. The Exec Ops, however, was conflict-avoidant and neither relayed the feedback to the founder nor caused the execs to give the feedback directly. The execs thought that their feedback was being delivered and became even more frustrated when they saw no action or response from the founder.

When I heard this story, I said to the founder: "That sounds terrible. So, this Exec Ops role has been a bust for you?" The founder responded: "Not at all. They have done a great job of helping me run meetings, making sure that everyone is prepared, and following up afterward. Totally worth it."

When you hire an Exec Ops for the first time, you will likely experience lots of relief once that person begins to take tasks off of your plate (usually within the first 60 days). This relief will only grow as they fully onboard (3-6 months) and start to jump on bigger and bigger tasks. At this point, they often take over the management of an ailing department (or two). They will likely do a great job in this role, but suddenly a new (and very big) problem will arise ... they are no longer shadowing you and taking as many minor (but burdensome) tasks off of your plate. And suddenly your life will get worse.

There is a very easy solution here. Once you realize that the Exec Ops position is a valuable one (most CEOs realize this at the 2-3 month mark), immediately ask your Exec Ops to hire 1-2 more CoS types. These new folks will become "Members of the Office of the CEO". They will shadow you in the same way that your first Exec Ops does, and they too will be onboarded within 2-3 months. Now, each team member will be qualified to:

- Shadow you consistently and take administrative tasks off of your plate, or
- Investigate and solve cross-department issues, or
- Run an ailing department

They can do one or the other well, but not any two. If your first Exec Ops wants to go run a department, she can. But not before there is another "Member of the Office of the CEO" ready to take her place as your Exec Ops.

When this happens, your first Exec Ops will likely experience fear that she will no longer be as connected to you, and the trust will eventually erode. This is just her fear talking, because once the trust is established, it lasts for a very long time.

Once you have an Exec Ops, make sure that they are regularly recruiting and onboarding more members (who report to the Exec Ops). These are your smokejumpers. Don't ever be left without 1-2 available to you.

Francis Davidson, CEO of Sonder:

"I'm a huge fan of the Chief of Staff role. Mine runs all OKRs and roadmap planning, and I ask him to do work I otherwise would do before. The latest example is that we had to collect feedback from 15+ people on a meaty set of issues we had to resolve, so he went and spoke with them and shared his notes along with recommended actions. He improves our management system and rolls out changes across the company - e.g., we want to add a new section to company goal meetings, so he'll work with each company goal owner to make sure they do it right. He has a team of 10 people who we dispatch into departments who struggle with our management system or need temp help. His team project manages high-priority cross-functional initiatives like IPO readiness. He and his team (the CEO's office) ensure that we are a well-run company and that I'm not dependent on making that happen consistently across all departments.

I should also add that he was at the company five years before I made him my chief of staff, and nearly everyone on his team has been at the company for at least two years before being on his team, and all show a huge commitment to the culture and are excellent at execution."

Chris Mansi, CEO of Viz.ai

"I agree with Matt [about not waiting for the ideal background]. I promoted my EA to CoS. She did not have the typical GSB/HBS/McKinsey background, but we did the 30-day shadowing period, and it's been amazing, both for the company and me. It is important that you trust the person completely as you'll likely have them in every meeting you take, including comp/challenging conversations. I also like the idea of promoting from within the org."

★ Interested in coaching or software to help implement the Mochary Method at your company? Please fill out our interest form [here](#), or book a discovery call with Nancy Xu [here](#).