So, you think you need a chief of staff?

- A catch-all role, filled by someone with exceptional organizational and people skills, who handles all manner of tasks not covered by an existing member of an executive's leadership team or administrative staff
  - Sometimes called: Business Manager, Manager of Strategy and Planning, VP of Operations, Aide de Camp
- Julius Sinkevicius (Microsoft CoS): "If content is king, context is god."
- Why useful? Exec roles more challenging than ever before
  - Growing complexities of running a business
  - Rapid tech change
  - Globalization
  - Regulations and Policy
  - General complexity
- Success of the role = good market dynamics + organizational dynamics + alignment in leadership style
- Org dynamics to consider: (p 20)
  - Medium to large size
  - Significant changes in leadership or organization structure
  - Multiple, diverse lines of business (including consolidation)
  - Spinoff
  - Business divisions with their own support structures, like Marketing, IT, and Finance
  - Businesses spanning geo dispersed teams
  - Competitive advantage through talent development and succession plans
  - Internal activities, meant to address external complexity, that end up compounding complexity
  - Leaders with particular styles, strengths, and positions
- CoS manages complexity
- Top priority: reduce the sheer number of items that bubble up to the CEO by delegating, dealing with them, or deferring them
- Use a CoS to fill in leadership gaps while you develop the leaders you're interested in
- Can be a risk management tool
- Tool of the CoS: time to get deep on issues, carries the weight of the CEO to make change a priority, leads by influence and relational capital to get groups to share info or to make change happen and stick (30)
- Role can be a tool for developing leaders in the org
- Early warning system for execs
- CEO's unwillingness to delegate is the #1 reason for for CoSs to fail

- "Someone who can ask the questions before I do, handle my communications and help me keep an ear to the ground" (39)
- Part thought partner, part executor
- Can help CEO: (p 45)
  - Focus on the highest and best use of your time
  - Execute or oversee work that has no clear departmental owner
  - Know what's really going on in your organization
  - Make and execute great decisions
  - Shorten your learning curve in a new company or industry
  - Ensure that the business functions when you are away
  - Develop and retain good people
- (From top down) Vision → Strategy → Operations → Tactics (aka Vision → Ends → Ways → Means); strategy is the way you meet your vision; Feedback loop; tactical reality shapes vision and strategy
- Goal: create space for exec to move from tactical → strategic
- Need someone who can get things done- translate situations into proposals
- Needs "x factor" connection with executive
- If multiple multiple owners, reality is no owners => let CoS own
- Sneaker diplomacy
- CoS is generalist; similar to COO
- CoS provides exec feedback on unfiltered reality - trends in operations, systems, and technologies
- Can clarify communication from top down and bottom up for better org alignment
- A CoS must represent you but is not you.
- Clarifying strategic intent → help decide if/if not worth doing
- Listening and perspective
- Understanding stated and unstated agendas
- Has proactive posture
- Understand strategic intent in the org so operational and tactical adjustments made at the line
- Generalist skill set
- Rotational vs career vs accidental career
- CoS partners with exec to set agendas
- "Effective information network" - info going up and down
  - Consistent messaging
  - Interference
- Anticipation of needs
- Pre-coordination
- Contingency planning
- Analyst + decision maker
- Leadership by example

So, you want a chief of staff; now, where do you find one?

- "The absence of a formal definition is also the opportunity for each executive to custom-craft the role to his or her unique circumstances or business needs" (98)
- Experience: 80% 6-8 years; 60% 10+ years
- Spectrum of responsibilities => simple, routine, tactical tasks - complex, unpredictable, strategic tasks
- If business need is visionary, strategic - VP as CoS model
- "One minute I was negotiating a nine-figure deal and the next minute I was booking my boss's rental car. You don't get to negotiate nine-figure deals at my age and experience level without taking some of the good with the bad. It's easy to come out of the nine-figure deal meeting and think you're too close to the boss to work on the little things like signing expense reports, btu it's just not true of this role- you do what it takes" (105) => "Chief get it done"
- Baseline competencies:
    - Problem-solving ability
    - Communication skills
    - Functional competence in one or more areas
    - Results orientation
    - Systems and process thinking
    - Anticipation
    - Political savvy
    - Coaching
    - Managed ego or servant leadership
    - Adaptability and flexibility
    - Interpretation or translation
- Adept at translating ask to action
- project/program management, but not rigid
- Important but not yet urgent - early warning system
- Role as mini MBA - way to develop leaders
- Not always a future exec (parallel of CoS in government not being the same as Vice President; is not stepping stone to president)
- Business generalist can better see whole picture and tradeoffs, but should also be strong functionalist- let their background help drive the work
- After CoS role:
    - 15% CxO at public company
    - 12% VP at public company
    - 6% Founder
    - 2% Partners (law firms, consultancies, etc)
    - 18% Director at public company
    - 46% lateral moves to previous role
- Previous experience with exec

- ○ 44% no previous experience
- ○ 22% mutual leader
- ○ 33% prior experience

So, you've got a chief of staff. Now what?

- 1 year to get buy-in from exec's reports
- At least 8 weeks to build trust with exec- need to build trust and set expectations for the role, which takes time; trust is most notable in its absence
- Will not know when to sit in the background vs when to speak up at first- will need to develop framework over time. Consider: (p 130)
    - ○ What decisions he or she is authorized to make on your behalf
    - ○ When your staff can go straight to you and when they need to go through your CoS
    - ○ What meetings the CoS should attend with you and which ones he or she should attend in your place
    - ○ Whether he or she has signing authority up to a certain monetary amount, partial or full P&L responsibility, and in what clearly defined areas
    - ○ The process for any unclear areas
- A strong CoS will over index on being bold and an exec should help her/him know when to reign in
- Expectation setting
- Visible support and defer to CoS- pull in to situations, have shadow
- CoS's goals need to be: help, learn, contribute
- Relationship building
- 360 review at 90 day mark
- Don't leave CoS out of conversations
- Recognize CoS will try to outwork and over invest in time to understand you and the work
- Drive project from beginning to end => ownership
- Leave space to make mistakes