CAHRS Working Group
The Role of the
Chief of Staff

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Participating Organizations:

Accenture
American Express
Barclays
Boehringer Ingelheim
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General Mills
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Key Takeaways:

1. There are a variety of models companies are using to determine what role their Chiefs of Staff play, whether the person is a high potential pass-through or a more experienced player and how they are selected. Factors important in this decision are: the business challenges and skills needed to support the strategic agenda at the time, areas of support needed by the leader to whom the chief of staff reports, and how this role may fit into succession planning/development.

2. The Chief of Staff is a unique and sensitive role. It is important to be clear with peers/leader on confidentiality, whether or not the role will be a facilitator or a gatekeeper, and what the decisions rights are to ensure success.

3. Communication and project management skills as well as functional interest (either expertise in the function supported or a desire to be in that function if coming from outside it) were seen as being important to the role.

The role of a company senior executive today is becoming overwhelmingly busy as business challenges increase and the rate of change accelerates. Many organizations have created support roles to ensure that these executives spend their time on the most critical priorities for their companies. This working group discussion focused on one of these roles: Chief of Staff (CoS).

Chief of Staff in the Private Sector?

Early on, the White House Chief of Staff (CoS) role was the model for some companies. Chief of Staff is the most colloquial title used; however, the companies present used a variety of titles including:

- Strategic Decision Support Leader
- Chief Administration Officer (CAO)
- Chief Operations Officer (COO)
- VP Services & Solutions
- Business Manager
- Director of Strategy & Execution
- Director Assistants or VP Assistants
- Director of Administration
- Strategy & Operations Director
- Maintain same title as prior role
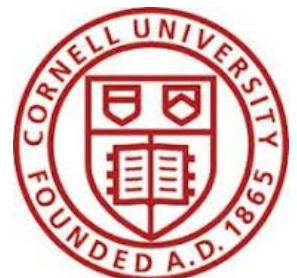
What Does the Role Actually Entail?

The roles and responsibilities of a CoS can vary greatly from company to company. The role can be very dependent on what the leader needs (i.e. the CoS could primarily be his/her right hand for many things) or can support the strategic agenda for the leader (i.e. program/project manager). All agreed that there are elements of both strategy and execution in the role. Here are some of the job responsibilities:

- Hold the leader accountable for achievement of his/her strategic plan
- Analyst & decision framer
- Prepare, plan and organize for internal & external meetings
- Stand in for the leader at meetings
- Facilitator (versus gatekeeper)
- Air Traffic Controller/triage for the leader with knowledge/savviness of where to connect into the function
- Confidante/trusted listener/feedback — chemistry is very important
- Change management /program management
- Budget management
- Internal communications
- Risk management/continuous improvement
- Other duties as assigned — the catch all for anything the leader wants done!

Some CoSs have teams of people reporting to them and others operate independently. At the working group, the team size ranged from zero to 20 employees with most having one to three direct reports. Some companies have long had a CoS role in place while others are just considering implementing this. The range of the group was from currently non-existent to 14 years.

One company had two tiers of CoSs — those that report to C-suite leaders (i.e. CHRO) and those that report to the CoSs of the C-Suite leaders (CHROs reports – VP Talent, VP Total Rewards, VP Diversity & Inclusion, etc.). This structure requires more communication but also provides a natural channel to disseminate information and priorities and gain alignment and support.

Another company that had a large number of CoSs had created a community through a regular monthly meeting of the group. This helped them form a network of support for each other since the role can be a lonely experience and sometimes viewed as a gatekeeper. This forum has also broken down silos between the independently operating functions, which in turn helps with connection and alignment and ultimately improves the employee experience.

Watch-Outs For the Role

- Don't let the role become a dumping ground for things that don't belong anywhere else
- Be careful of letting others shortcut the normal systems by going through the CoS — push things back to the right channels
- Ensure this isn't a glorified admin assistant and make sure peers are aware of this
- Must have clear decision making rights
- Titling could be important in some cultures to ensure it is an equal player on the team (especially if the person is junior to others on the leader's team)
- Be clear about what is and isn't in scope for the role

Competencies for CoS Roles

The background of the CoS could depend on the leader's needs (complementary skills) or to support a specific strategy or business agenda. In addition to these specific traits, some other competencies identified as important are:

- Ability to influence without authority
- Agility
- Dealing with ambiguity
- Operational or Functional experience — helps with credibility and to understand the pain points your leader may face
- Strong communication skills — may ghost write for leader, understand voice/tone
- Business acumen
- Enterprise view — understands where things fit into the bigger picture
- Knowing when to be a driver and when to be a passenger
- Knowing when to take the strategic view versus being hands on/executional
- Project management
- Politically savvy
- Ego management — not sharing information when you have it/power
- Relationship building
- Time management/prioritization
- Intuition/EQ/empathy
- Coaching; knowing when and how to give the leader feedback

One other thing that may be impacted is work/life balance. In companies where the role is the right hand of the leader, the CoS may need to be available at any time needed by leader.

Rotational or Experienced?

Companies differ on whether their roles are rotational or more experienced/have continuity. The rotational CoSs could be junior in the organization and considered high potential or bring in a specific skill needed to support the business strategy (i.e. project or program management). Those with rotational roles ranged from one to three years in the role (the more junior the person, the shorter the rotation and the more executional). Critical to success here is planning for the right length of onboarding or overlap so as not to disrupt the agenda or leader. Those in continuity roles tended to be selected for certain skills that the leader wanted on his/her team as support (usually with complementary skills to the leader). Another key thing to consider is if the role is driving a strategic agenda, the person may need to be in the role longer to deploy it most successfully. Another watch-out is underutilizing the person in the role.

One of the benefits of having the CoS role is the enterprise view and the ability to see what other positions the COS might have a future interest in. At the companies present, the CoSs have a lot of input into where they go next. In fact, the feeling was that *where* the CoS goes is his/her responsibility; *when* the CoS goes is the leader's responsibility. In other organizations, it was clear that the CoS was being groomed for a specific senior level role.

What Makes a CoS Successful?

While there are certain hard skills and competencies required for a CoS role, specific traits/behaviors can ensure success or potentially derail the CoS.

- Complementary qualities to your leader (having strengths in areas s/he may not)
- Trustworthy — certain temperament and demeanor
- No personal ego
- Simplifier — makes things easier and simpler for the leader
- Courageous — willing to have difficult conversations with the leader
- Balancing confident decision making while minimizing risk at the same time
- Has the pulse of the organization — need to be touching base with a lot of people but balance that with not being too intrusive with peers
- EQ — Intuition — being able to read what's happening with your leader or the organization
- Peer relationships — being a sounding board and confidante to peers will increase effectiveness. Be clear with peers on the role with leader and what the CoS will/will not tell them (not betraying confidences, etc.)
- Discretion and impeccable judgment

In this type of role, if CoSs do the job well, no one knows how much work it was; if it goes wrong, it's all on them.

Why Would You Ever Want to be a CoS?

The primary benefits of undertaking this role are personal and organizational exposure opportunities like:

- Enterprise-wide exposure and familiarity — helping you see where you may want your career to go
- Leadership thinking — how senior leaders approach business challenges
- Create unbelievable networks/relationships
- Gain external perspective — exposure to external meetings/organizations, etc. and ability to bring that inside
- Jack of All Trades/Master of None: learn a little bit about everything — but not go deep on anything
- Gain a peek behind the curtain
- Learn how things *really* get done — informal networks; unwritten rules; who really has the leader's ear; side-bar conversations

Over time, the CoS may know how the organization works better than even your boss.

Partnering With Your Leader's Administrative Support

The Executive Leader likely depends on his/her Executive Assistant (EA) as much as his/her CoS. It is important that the CoSs do all they can to have a successful partnership/relationship with the EA. Here are some ways to do that:

- Make her/him part of the equation and a partner in finding solutions rather than a gatekeeper
- Share mission and priorities and treat her/him like an equal team member — this helps with context and why things are happening
- Express appreciation and gratitude — s/he will anticipate the leader's needs as well as your own
- Develop the relationship — have 1:1 weekly updates; go to her/him vs. s/he comes to you; take out to lunch
- Trust and transparency are key

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