

Do CEOs Need A “Chief Of Staff”?

by Madeleine Niebauer

In the White House, the most quietly influential job is to serve as the President’s chief of staff. Gatekeep, counselor, alter ego, sometimes “bad cop”—the chief of staff plays a crucial role in success. Corporate chief executives are now also discovering the value of a chief of staff, both in making the huge job of CEO more manageable, and in serving as liaison with the board.

In politics, the “chief of staff” is ubiquitous. He or she is the person tasked with protecting and promoting the interests of the politician. The relationship between the politician and the chief of staff is characterized by a very deep level of trust. This person is the top advisor, who has the ear of the politician more than any other. Given the challenging and nuanced world of politics, it is not surprising that this critical role is central to an administration’s success.

In the corporate world, the chief of staff has also become more common. Most CEOs of large corporations have a chief of staff, or someone who plays a similar role. Executives and corporate boards should consider whether the time is right to invest in a chief of staff. What benefits can it bring, and how do you find someone who will excel as a CEO chief of staff?

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□ *What does a chief of staff do?* The chief of staff plays a critical role supporting a leader, though what that means in practice varies widely. The most important aspect of this partnership is the “fit” between the leader and the chief of staff. This fit is not an identical match of personality traits and technical competencies, but rather a combination of attributes that enhances productivity and establishes close rapport.

As Tyler Parris notes in his book, *Chief of Staff: The Strategic Partner Who Will Revolutionize Your Organization*, “To help [a leader] make and execute great decisions, the chief of staff serves as analyst and decision framer on one hand and project manager, change agent, and coach on the other.”

Some of the more common ways a chief of staff supports the leader include:

□ *Setting a leader’s strategic priorities.* The chief of staff helps a leader identify the areas where she must direct her focus and the metrics to be used to measure success and evaluate progress. She leads annual strategic planning for the company, and creates and updates dashboards for reviewing key performance indicators.

□ *Strategically managing a leader’s time.* The chief of staff works with the CEO’s assistant, looking at the long-term travel calendar, evaluating opportunities and determining fit with priorities.

□ *Meeting preparation and follow up.* The chief of staff reviews upcoming meetings for the week to ensure the CEO has all of the information needed to be as productive as possible. She manages the meeting cadence for the board of directors and leadership team, ensuring materials are sent in advance, time is well spent, and objectives are achieved. She also plans and leads company retreats and other special events.

□ *Reviewing internal and external communications.* The chief of staff drafts company newsletters, reports, pitch decks, speeches or presentations for the leader and the board of directors.

□ *Monitoring information flow.* Sometimes acting as a gatekeeper, the chief of staff ensures a leader’s involvement in a project or decision-making process at the right moment.

□ *Project management.* The chief of staff oversees large, often cross-functional organization-wide projects or initiatives. She brings together multiple

Madeleine Niebauer is founder and chief executive of vChief, Virtual Chief of Staff LLC. [www.virtualchiefstaff.com]

Powers Behind The Throne

Some Outstanding CEO Chiefs Of Staff

Most large companies have CEO chiefs of staff. Here are some of the most outstanding examples.

□ Brian Rumao has acted as the chief of staff to LinkedIn CEO Jeff Weiner for four years. Rumao has written a number of great articles, published on LinkedIn, about the chief of staff role, how LinkedIn executives run meetings, and how quarterly business reviews have been a “gamechanger” there.

□ Jill Tracie Nichols spent three years as chief of staff to Microsoft’s CEO Satya Nadella, after being Steve Ballmer’s communications director for years. With little-to-no formal business school or training, she shattered the myth that you need an MBA to succeed as chief of staff. Nichols navigated her way to the top during a major leadership/cultural transformation at the Fortune 50 behemoth, and recently launched her own communications firm.

stakeholders and helps drive decisions.

□ *Leading hiring processes.* The chief of staff drafts and posts job descriptions, outlines an interview process, and screens candidates for roles reporting to the leader or board of directors. This may include executive assistants, special projects managers, speech writers, or others.

A chief of staff often has experience in strategy and project management, and can help CEOs create strategic plans, but also needs to be a generalist, with experience in many different areas.

□ *How does a chief of staff differ from an executive assistant?* It is easy to understand why people confuse the executive assistant and the chief of staff roles. Both support an organization’s leader in a personal, high-touch way. Both roles are also inherently tied to keeping an executive organized, prepared, and focused. However, there are some key differences.

The role of the executive assistant tends to be focused on logistics, such as travel, scheduling, and

expense processing. These are things that require a very strong eye for detail, and are incredibly important, as the smallest mistake can have huge implications for a company’s leader.

The role of the chief of staff, by contrast, is that of a senior-level strategic partner. A chief of staff might manage projects across the entire organization, working with a variety of stakeholders and staff. If the CEO is traveling or unavailable, the chief of staff must make judgments about what the leader would do and act on those judgments.

A level of nuance is required. A chief of staff often has experience in strategy and project management, and can help CEOs create strategic plans, but also needs to be a generalist, with experience in many different areas. As an executive’s spokesperson, the chief of staff must also understand the leader’s communication style and be able to write things like emails and reports in that style.

In his book, Tyler Parris posits that “one leader’s chief of staff is a high-powered executive assistant, while another’s is a vice president, with most chiefs of staff falling somewhere in between.”

Typically, a CEO will have duties that run a spectrum from the administrative to the more strategic. If the bulk of the work lies more towards the strategic side, a chief of staff role may make more sense. As Parris notes, “You will likely call upon your chief of staff to perform in situations dramatic and mundane, strategic and tactical.” Very true. The best chiefs of staff are servant leaders, happy to take on truly anything their leader asks, regardless of whether it is providing input to a group of high-powered senior leaders—or ordering lunch for them.

Sometimes, leaders will have both a chief of staff and an executive assistant, where they work hand in hand, but provide distinctly different types of support. Though there is sometimes cross-over in the types of duties, it is helpful to think of these roles as unique and distinct in what they bring to a leader.

□ *Helping CEOs focus on their strategic priorities.* One role a chief of staff often plays is helping the CEO set personal strategic priorities, and then ensure that his or her time is aligned with those. Setting priorities has never been more important than it

is today, when everything moves at light speed and attention is constantly being pulled in a thousand directions.

Companies and executives are pressured to accomplish ever more—faster, cheaper, and better. All of this is just wasted time and effort, however, without a plan to know where they are going, and why.

In *The 7 Habits of Highly Effective People*, Steven Covey writes, “If the ladder is not leaning against the right wall, every step we take just gets us to the wrong place faster.” Companies small and large have been heeding the call to set strategic priorities to help their businesses focus time, energy, money, and human capital on those things they do best.

Leaders should take a page from their businesses and develop their own personal strategic priorities at work. Just as strategic priorities help an organization focus its time and attention on those things that matter most, so too will personal strategic priorities help CEOs. To set the priorities, the CEO and chief of staff will often review the company’s priorities, think about the unique value add the CEO can bring in achieving those priorities, and consider any areas for growth that emerged in the CEO’s performance review.

Once the priorities are established, concrete, measurable goals and metrics are set, which can be reviewed monthly to assess progress. The chief of staff and executive assistant will also refer to these priorities as they think strategically about how the CEO is spending his or her time, determining which meetings or opportunities should land on the calendar, and which should be delegated to other team members.

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Having a chief of staff develop and maintain these strategic priorities keeps the executive focused on the company’s goals. The board, in turn, is kept well-informed by the chief of staff about the priorities of the CEO. She helps to establish the priorities, deter-

mine the metrics necessary, and review the course in order to adjust when needed.

□ ***The chief of staff and the board of directors.*** The chief of staff often plays a behind-the-scenes role with the board of directors. Very typically, this is the person who ensures the calendar of meetings is set and that meeting materials are prepped and sent in advance, and captures action items and follow-up tasks coming out of board meetings.

Sometimes a chief of staff plays a liaison role with individual board members or board committees, to ensure they have what they need from the CEO and vice versa. Because a chief of staff has the ear of the CEO and provides regular counsel, he or she can sometimes give context to board members that they might not receive from other team members. A chief of staff also often coordinates with directors on the CEO’s performance review.

□ ***A chief of staff and executive performance reviews.*** Performance reviews are a mainstay of communication between employer and employee. When a manager, director, or CEO conducts the review for a direct report, there is often a step-by-step form provided by HR. This is a checklist of relevant goals, scores, and comments designed to address every facet of that executive’s professional duties, performance, and satisfaction. The same cannot always be said for the CEO’s own performance review, however. This may be perfunctorily performed by the board chair, and based only on a few annual financial figures.

A chief of staff can help the board review the performance of corporate leadership. She can head the process of gathering, synthesizing, and delivering the review. This sends a positive message to board members and direct reports alike that regular, objective feedback is important to the company.

The chief of staff collects feedback from direct reports, other staff, board members, external partners, and funders/investors. The executive should also conduct a self-review, reflecting on measurable goals for the year. Such comprehensive assessment from all areas of the company foster an environment of inclusivity and show the strengths and weaknesses of the executive. This allows the board to learn how leadership is perceived by employees.

Because the chief of staff serves as a strategic partner to the executive and often speaks to the board on his or her behalf, she is uniquely suited to provide this performance review of the executive to the board.

The review is one important way for executives and boards to keep the lines of communication open and operating smoothly up and down the line. No one is perfect, but done regularly, openly, and effectively, the personal review can provide useful feedback and direction to help keep leadership on track.

Superstar chiefs of staff are incredibly driven to achieve results, and are natural problem solvers.

The chief of staff role and leadership varies from company to company. However, we have identified particular skills and traits that make most chiefs of staff successful in the role and as high-potential future leaders for the organization.

☐ ***Characteristics of a superstar chief of staff.***

☐ *Ability to get things done.* Superstar chiefs of staff are incredibly driven to achieve results. They are tenacious in the face of adversity, and carry a can-do attitude. Master organizers and project planners, they consistently look ahead and anticipate needs before they arise.

☐ *Strategic mindset.* Chiefs of staff are natural problem solvers. They are analytical and structured in their thinking. They create order out of chaos by identifying systems and processes in need of tightening. They deeply understand business operations and easily synthesize information to develop a recommended plan of action.

☐ *Off-the-charts emotional intelligence.* Chiefs of staff must understand the underlying motivations not only of their leader, but also of themselves and others across the company with whom they build relationships and influence. They are politically savvy—the ultimate connectors, in the know about every key project, and able to connect the dots across the company. They are positive, empathetic, flexible, curious. They garner respect and people want to be around them.

☐ *Loyalty and managed ego.* A leader trusts the chief of staff above all others. Chiefs of staff are deeply loyal, thinking of their leader before themselves and looking for ways to elevate them. They must be confident enough to be candid and push back at times, while also humble enough to happily remain behind the scenes.

☐ ***Identifying superstar talent.*** Spotting true “superstars” during the hiring process is difficult, but there are ways to tailor your approach to better assess chief of staff-specific traits.

☐ *Understand the most critical technical and behavioral competencies required* for this specific position. This aids in developing interview questions that assess the right factors.

☐ *Spend ample time with candidates* to understand their individual strengths and skills in areas mentioned above. An answer to one question may not be enough, but over time their responses will uncover their skills and abilities.

☐ *Check references.* Ask a variety of the candidate’s professional references (former supervisors, subordinates, colleagues, clients, etc.) about the chief of staff-specific traits. They may provide an interesting perspective.

☐ *Consider having finalist candidates shadow the CEO* for at least a few days. This time together allows both the candidate and executive to get a feel for each other’s personalities and work styles. It also helps develop rapport during the selection process, giving both more comfort about a future partnership.

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☐ ***Hiring a superstar chief of staff.***

☐ *Search internally.* One obvious place to look for a superstar chief of staff is within your company. It is a great opportunity for a rising star to build broad generalist skills and gain access to key leaders across the organization. Parris notes in his book that companies often use the role as “a formal, rotational position that is specifically designed to develop high-

potential leaders.”

□ *Search externally.* To source the role externally, you can share the job description or post it on job-search websites. Given the critical nature of the role and the importance of a strong fit, consider engaging an executive search firm.

□ *Part-time option.* If you could use a chief of staff, but lack the resources or workflow for a full-time staff member in the role, consider bringing on a part-time chief of staff. Some clients have also found it is a great opportunity to try out a chief of staff and see if they benefit.

When is the right time for a CEO to bring on a chief of staff? There can be value for any company at any stage. The CEOs who see the biggest value are those

overwhelmed with tasks, and needing someone to take things off their plate so they can focus on the areas where they will have the most impact. It can also be helpful for a CEO who needs a thought-partner and trusted right-hand person who can offer advice on the challenges at hand.

A chief of staff is a tremendous asset for a CEO or other executive leader. He or she can bring value to the board of directors as well, by ensuring meetings are well-planned and follow-up action items are moved forward. The chief of staff can also be a great liaison between the CEO and the board. The key to success is finding someone who excels in the role and can provide strong leverage to both the CEO and the board. ■