



LEADERSHIP

The Case for a Chief of Staff

by [Dan Ciampa](#)

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When new CEOs with a change mandate take over a company, they typically invest time in reshaping its strategy and determining the kind of culture needed to succeed. Those choices guide other decisions, including who their senior managers will be and how the leaders will allocate their time.



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Most new CEOs pay little attention to a key factor that will help determine their effectiveness: the administrative system that guides day-to-day operations in their offices. This system ensures that leaders make the most of their limited time, that information arrives at the right point in their decision-making process, and that follow-up happens without their having to check. Many new CEOs default to the system they've inherited, even if it is poorly suited to their style or to the operational changes they must make. Often there's a better way to handle the information flow necessary for a CEO to succeed—and very often a chief of staff (CoS) can play an essential role.

During the 25 years I spent working at a consulting and software firm—a dozen as chairman and CEO—I had a chief of staff myself. As an adviser and as a board member, I've recommended to several dozen executives that they add the position to their teams—and in some cases I've helped them hire for and structure the job.

Although each leader should tailor the position to his or her own needs, the CoS should handle several principal duties, all focused on making time, information, and decision processes more effective. Patrick Aylward, a vice president and CoS at Horizon Blue Cross Blue Shield of New Jersey, breaks the job down into five roles: serving as an *air traffic controller* for the leader and the senior team; as an *integrator* connecting work streams that would otherwise remain siloed; as a *communicator* linking the leadership team and the broader organization; as an *honest broker and truth teller* when the leader needs a wide-ranging view without turf considerations; and as a *confidant* without an organizational agenda. Aylward points out that “while a CEO's other direct reports typically emphasize their own areas, a good CoS can consider the needs of the whole enterprise.”

The most sophisticated chiefs of staff also assist CEOs in thinking through and setting policies—and making sure they are implemented. They anticipate problems and are especially sensitive to issues that require diplomacy. They function as extra eyes and ears by pointing out political potholes their bosses may not recognize (especially if the bosses are new to the company). Importantly, a CoS acts with the implicit imprimatur of the CEO—something that calls for humility, maturity, and situational sensitivity.

The CoS role is decidedly different from that of the leader's executive assistant (EA). Unlike an EA, a chief of staff works autonomously and does not handle routine correspondence or manage the leader's day-to-day schedule. The highest-level CoS should be a full-fledged member of the senior leadership team, albeit without the rank or compensation of a C-suite officer.

Regardless of specific responsibilities, a CoS can help a leader achieve sharp gains in productivity and impact. Take an executive I'll call Joe, who was promoted from head of sales and marketing to president of a midsize company that had just been acquired—meaning that Joe was now reporting to a chairman and CEO at a distant headquarters, adding political complexity to the job. A few months in, he was struggling. “I wasn't myself,” he recalls. “I was a step slower. I was working longer hours than I ever had but not getting as much done and not spending time on what mattered most.”

A CoS's primary duties make time, information, and decision-making more effective.

Joe hired a chief of staff—someone who'd held that role at a larger company in the same industry. Within three months Joe was better prepared for meetings and more confident delegating (because he knew that his CoS would follow up). Within six months his communications to the organization were more frequent and clearer. He'd built a better relationship with corporate headquarters. Perhaps most satisfying, he had more time to think through big decisions, with the CoS serving as his most reliable sounding board. “He's the best listener of anyone who's ever worked for me,” Joe says. “It's not that he gives me the answer but that our discussions make the answer clearer.”

At some large companies, executives reporting to the CEO also choose to have a CoS. One CHRO has employed five over the past 10 years (the fifth is still with him) while working at two *Fortune* 100 companies. “The most visible benefit for me has been time,” he says. “I've picked up a third more time, and I've been able to get more done. Just as important is that my chiefs of staff created a system so that I can stay focused on my CEO and board

and still make sure that the day-to-day things don't fall by the wayside." This executive treats the CoS role as a rotational one lasting two to four years. It's a coveted assignment because it's typically a springboard to a bigger job: Three of his prior chiefs of staff went on to become the chief learning officer, the head of talent acquisition/planning and leadership development, and a senior manager in the compensation department.

Is a Chief of Staff Right for You?

The CoS role originated in the military and government, and it dates back centuries. Cicero, the Roman politician and orator, used a slave named Tiro, who, according to Cicero's biographer Zach Bankston, served as a secretary, a financial overseer, and a political strategist. Andrew Roberts's *Napoleon: A Life* describes the vital role that Louis-Alexandre Berthier played in assisting Napoleon at the height of his powers. The historians Ron Chernow and Joseph Ellis have described the CoS-like role that Alexander Hamilton played for George Washington. These people aren't to be confused with the personal secretaries or aides-de-camp that each leader also had. Rather, they were close advisers who handled the most-delicate strategic matters and became trusted confidants.

Lately the CoS position has become more common in corporations. According to Tyler Parris, the author of *Chief of Staff: The Strategic Partner Who Will Revolutionize Your Organization*, 68,000 people held the CoS title in 2015 in nonmilitary, nongovernment organizations in the United States—mostly large companies. Parris found that half the companies use a rotational model in which high potentials are tapped to spend a set period (typically two years) in the role and then move to a line job. At companies that don't use a rotational model, people often remain CoS for five years or more.

Not every executive needs a CoS, and the role is not right for every corporate culture. Liza Wright, who served as the director of presidential personnel in the White House for George W. Bush and later cofounded a search firm specializing in hard-to-fill jobs (including CoS), looks for three signs that a CEO would benefit from adding the role: concern about productivity, poor information flow that results in slow decision-making,

and too much time spent on back-and-forth and follow-up. She says, “If the leader is experiencing these areas of dissatisfaction, the right kind of chief of staff may well be the best solution.”

If you’re an executive looking to increase your effectiveness, these seven questions will help you decide whether a CoS might help you:

- Are you spending enough time on the vital A items on your agenda, or are you frustrated by time spent on B and C items?
- Do you have enough “white space” in your calendar to consider future opportunities, or is most of your time spent reacting to what has already happened?
- As you deliberate on the decisions that only you can make, are you getting the best available information? After you’ve made a call, do you get surprised by new information that you should have known?
- Is it common for you to feel unprepared for important meetings or when making important decisions? Do you get information soon enough for you to think through the consequences before having to act?
- Are problems identified early enough that action can be taken before they create damage, or is it common for large problems to occur unexpectedly? When that happens, do you find that some of your senior people were also unprepared?
- Do political or cultural factors—such as relationship problems between powerful subordinates or destructive gamesmanship between competing departments—block progress? Does the culture encourage resistance to change or insulated silos rather than embracing new ways to improve?
- When you direct that some action be taken or ask for data on a particular issue, do you often not hear back until you remind people? When managers say they will follow up, do you have confidence that they will?

Even in these circumstances, some chief executives are reluctant to add the CoS role. That may stem from unfamiliarity: Without ever having seen a skilled CoS in action, it can be difficult to envision the value one can add. Sometimes reluctance is more about optics and

concern that a CoS will make the leader seem imperious or desirous of an “entourage.” Those considerations are understandable. But when set up in the right way, a CoS position can make it much easier to solve the problems facing a leader with a change agenda.

Shaping the Job to Fit the Need

My observations of how this position has evolved in business organizations suggest that it entails three levels of responsibility.

Level 1

A CoS at level one has typically been promoted from an executive assistant role. An example is Susan, who was the more senior of two EAs to the CEO of a large energy-related corporation before she became his CoS. Her replacement as senior EA and the other assistant now report to her. In addition to overseeing use of the CEO’s time and ensuring his focus on the most important issues, she manages special projects for the CFO and the head of human resources. She also prepares prework, handles follow-up, and sits in on most board meetings. Susan has worked at this company for almost 20 years, under three chief executives, and she understands the culture. She has good project-management skills, is well regarded by each of the CEO’s direct reports, and was underutilized in her executive assistant job.

Level 2

Greg is typical of a level two CoS. He joined a large life sciences company as chief of staff after earning a PhD and an MBA from top programs and then working for a strategy consulting company, where his current boss was a client. Greg works closely with the heads of business development and R&D on alliances and acquisition projects, and with the chief human resources officer on finding scientific talent. Much of Greg’s time is spent helping manage relationships with the company’s scientific partners and studying the forces that have an effect on the company’s strategy, such as academic research, medical advances, and the activity of competitors. He also interacts with regulatory agencies regarding approval of the company’s emerging products. Greg has no direct reports, but he does have important responsibilities and a constantly changing portfolio of projects that require sophisticated skills.

Level 3

Chiefs of staff at level three are typically found in large, complex organizations facing the need for dramatic strategic, operational, and cultural change, especially when the leader is new to the top post. This role is closest to the influential CoS jobs common in government and the military. It is exemplified by someone I'll call Carol.

After earning degrees in economics, psychology, and management, Carol spent 12 years in a multinational technology and operations-improvement consulting firm specializing in the integration of acquisitions and the management of alliances. That was followed by several years at a global corporation as a division president's CoS and the head of its planning and analysis departments. She was then hired as a CoS for the new CEO of a large and growing technology provider.

Which Level of Chief of Staff Is Right for You?

	LEVEL 1	LEVEL 2	LEVEL 3
Leader's challenge	Maximize efficiency with minimal change	Implement the existing strategy with only moderate change	Execute significant strategic, operational, and cultural agendas calling for considerable changes
CoS role	Help the leader become better organized, with more time for A items	Manage important projects well	Help CEO and senior executives navigate through uncertainty and risk
CoS capabilities	<ul style="list-style-type: none">• Understands the business• Can do project management• Can manage relationships• Communicates well• Organizes the CEO's office	<p>In addition to level 1 capabilities...</p> <ul style="list-style-type: none">• Can simplify complexity• Does strategic thinking and problem analysis• Can manage the process of idea to execution	<p>In addition to level 2 capabilities...</p> <ul style="list-style-type: none">• Can anticipate and avert problems• Can grasp and add value to the leader's vision• Has organizational and political intelligence
Reporting relationship	Part of the administrative staff	Reports to a direct report of the leader	Reports directly to the leader

Status	Administration	High-potential, future senior manager	Managerial or senior staff member
Managerial duties	Usually has no direct reports	Manages a small group or an individual contributor	Manages a department, such as strategy implementation or communications
Time with the leader	Regular, transactional, brief	Episodic, project oriented	Frequent, on a range of issues, whenever necessary
Advice to the CEO	Not expected	Expected within project parameters	Expected on a full range of topics

In that role Carol manages the office of the CEO and is responsible for ensuring the execution of her agenda—a job that includes time management, flow of information to and from the CEO, and seeing that the CEO is always prepared and rarely surprised. Carol also coordinates special projects and drafts presentations and other materials for board meetings, investor conferences, and employee town halls. She runs an analysis/program management unit and is involved in alliances and acquisitions, often working closely with the heads of strategy, M&A, HR, and the company’s innovation center. She is a member of the executive committee, which offers her an opportunity to build relationships and credibility with other direct reports to the CEO. Carol has earned the CEO’s trust, becoming an important internal adviser and “honest broker” who presents both sides of complex issues while maintaining objectivity.

A good CoS knows which relationships are most important to the leader’s agenda.

The tasks done at levels one and two are not new; what is new is that the people doing them are increasingly being given the title chief of staff. The level three role is a relatively recent development in business. Carol’s work is distinguished from Susan’s and Greg’s by its depth and because she works on the company’s top priorities, at its strategic core. Another difference: Carol spends two or three hours a week one-on-one with the CEO and often travels with her. (Greg and Susan, in contrast, may meet with their CEOs for just two or three hours a month and don’t travel with them.)

Another distinguishing factor is where each job is likely to lead. Susan's next step could be a managerial position in either financial planning or the benefits department. Greg will probably move to a district manager's job for field experience and then go on to head up strategy or business development. Carol's career path could move through senior marketing or operations positions and might eventually lead to chief operating officer.

Whether a CEO requires a level one, two, or three CoS depends on a number of things. If the leader enjoys a stable environment, needs help mostly with time management and information flows, and perhaps has an experienced EA who is ready to handle more responsibility, level one may be the right choice. A new-to-the-organization CEO who is facing more-complex challenges—such as implementing a new strategy or a cultural transformation while simultaneously driving short-term operational results in a volatile industry—will most likely benefit from a level three CoS. CEOs whose situation falls somewhere in between and who need research, analysis, and program management might consider level two.

There are considerations beyond context, however. Which level of responsibility a CoS should have depends as well on the skills and ambition of the person hired for the role and the chemistry and trust that develop between the CoS and the CEO. In some cases a level two CoS may evolve to level three duties over time as trust and abilities develop and the relationship deepens.



Each level requires the same handful of foundational abilities. One is well-developed project-management skills: being organized and disciplined, showing attention to detail, and following up doggedly to ensure the right results. Another is business savvy, including an understanding of the marketplace, competitors, and technology and what is required for sustained operating results. A third is the ability to see what pressures the leader faces in pushing the company to change and to find ways to lessen them. A fourth is the ability to recognize which relationships are most important to the success of the leader's agenda so as to assist in strengthening them. Finally, communication skills are crucial, because the CoS must help refine the leader's message and ensure that it is understood by the right audiences. (This is why many governmental chiefs of staff are former speechwriters.)

Leaders who are new to an organization—with or without a mandate to create significant change—will require even more from a CoS: the ability to envision the culture that the CEO wants to create and a sophisticated mix of emotional intelligence, judgment, discretion, diplomacy, and political acumen, which enables the CoS to interact with powerful direct reports to the CEO and board members with confidence and poise. Because of the added responsibilities required of a level three CoS, it is crucial that onboarding include a careful review of the culture, including who has influence and why, the leader's style and personality, and the board's expectations for change.

When first establishing the CoS position, it is also important to prepare the organization. The CEO's executive assistant should understand the CoS role, because she or he sits upstream in the flow of information and will continue to handle routine duties that support the chief of staff's activities. More critical is ensuring that the leader's other direct reports understand why the role was created, how they and the company will benefit from it, and what the CEO expects from them in terms of support. If these issues are ignored, adding a CoS can upset the balance of working relationships at the most senior level of the company—a place where status, power, and access are always delicate matters and are carefully calibrated.

Two final factors will determine whether incorporating a CoS into the chief executive's office will improve things. First, is the leader willing to make some changes to his or her routine once the chief of staff is aboard? If the CEO is used to being his or her own chief of staff and continues to act in that way after hiring one, not even the best aide will succeed. Second, will the two of them have a relationship that allows the effective giving and receiving of feedback? From the very outset, the CEO should make a deal with the new CoS: If she hones her ability to give feedback, the CEO will be open to it and listen carefully. The relationship that results will improve performance and satisfaction for both leader and subordinate.

Everyone requires help to achieve his or her highest potential and to sustain the effort it takes to lead a complex organization. The right chief of staff can be an important source of assistance to leaders who are pushing their organizations and themselves to ever better performance.

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