

APPENDIX: CHIEF OF STAFF

In 2007, on a cold and windy March afternoon, I crossed an open field at the National Defense University (NDU) in Washington, D.C. I was there to interview for an aide-de-camp job under then-Lieutenant General McChrystal, who had given a brief lecture to the students while home from Iraq for thirty-six hours.

NDU was founded after World War II in order to create cross-functional relationships among our various services, an ability I'd have to demonstrate should I get this job. As a result, the location was more fitting than I appreciated at the time, given the year ahead of me and the lessons it would hold about overcoming tribal barriers. The university's brick buildings, set along the Potomac River, had a stately appearance, and I was anxious about the interview.

At the end of our relatively straightforward discussion, McChrystal had asked me simply, "Do you want this job?" Of course, any interviewee should see questions like this coming, but I hadn't expected it to be put to me so bluntly. Frankly, it had never crossed my mind that a three-star general would be interested in what I did or didn't *want* to do.

My response to this question was as honest as it could be, and I made sure to not be disrespectful to his current staff officers, one of whom sat in the room with us.

"Sir, I don't think anyone in our community dreams of being an aide, and it's certainly never a position that I've sought." I paused. "That said, I've felt something change in our organization over the past few years—we're running differently, and better. An opportunity to see behind the

curtain and understand how this is working . . . Well, that’s fascinating to me.”

McChrystal’s face was blank, unreadable, and I assumed that he might have found my answer weird. Maybe, I thought, I was totally wrong: maybe there weren’t any new practices to be understood but rather just a fortunate distribution of leaders who were responsible for our improvement. If this was indeed the case, then my answer had probably seemed nonsensical.

McChrystal and I talked about that interview a few years later, and he remembered that answer, saying it “was the moment I decided to bring you onto our staff.” I hadn’t known at the time how passionate the Task Force’s leadership team were about the unifying practices they’d put in place, and the fact that I’d expressed interest in seeing things up close, he told me, sealed my fate.

One week later, after an all-too-short discussion with my wife explaining the significance of this opportunity (which would in reality be a one-year deployment away from my family), I was notified that the job was mine. After this was announced to my solid-line leadership, I received a simple one-line e-mail from the commander of my SEAL team: “Welcome to the show . . .”

Since leaving the military in 2012, I have noted an ever-increasing interest in the chief of staff (CoS) function within various parts of private-sector industry. My formal title for McChrystal was “aide-de-camp,” but the functions the job would entail were akin to those of the current chiefs of staff whom I’ve interacted with in the corporate world.

The aide-de-camp position has a long history within the military—an early example of this in the American armed forces was between Founding Fathers George Washington and Alexander Hamilton. Aides are historically used for a wide range of work, and the experiences of any one aide are unique to the command they are assigned to and, more important, the individual officer they are working for. On both of these fronts, I was incredibly fortunate.

In Iraq, I was observing an extremely prominent general lead a war-time counterterrorism organization during a period of peak need—which resulted in my taking on unusual functions for an aide. As I’ve discussed throughout this book, McChrystal allowed me and other staff to be exposed to strategic discussions, to sit through key interactions, and to be

granted broad access to the clear majority of information crossing his desk. We were limited less by our rank, and more by our personal judgment—and with that level of empowerment came high expectations.

Members of McChrystal's immediate staff were expected to listen, think, connect dots, and drive actions in line with the same level of empowered execution that was taking place within the battlefield units. We were his filters against complexity, expected to act when appropriate, or deliver clear and well-framed information to our organization's senior leadership when the situation demanded.

The titles might be different, but the functions that I and other staff members filled were akin to some of the best practices I've seen in the CoS role in civilian contexts. In the best examples I've seen among aides within private industry, C-suite executives leverage their staff in a similar fashion to what was practiced in the Task Force. I've seen an exceptionally wide range in how these staff positions are leveraged by senior leaders in industry, sometimes within the same organization.

In an organization with a confused approach to developing their chiefs of staff, one CoS might be focused on transactional efforts, such as scheduling or briefing books; another might focus more heavily on daily administration, removing smaller tasks from the executive's daily responsibilities; whereas a third might be acting as a strategic adviser, helping a CEO think through the next quarterly report or a pending merger. Each of these can be critical jobs, but in my experience, most senior leaders with a CoS hope for a different vision of this role, but leave the desired outcome of getting there to chance.

If you're a newly appointed CoS or, perhaps even more critically, a senior executive who is trying to best utilize a CoS position on your team, the following model may be a helpful guide.

It is broken into four quadrants, each defining a different phase of a CoS's development into fulfilling the potential of their role. For example, a newly assigned CoS, regardless of experience level, should be expected to start their job in quadrant one, and then develop clockwise through the quadrants presented in the graphic on page 254.

The timeline for that progression will vary depending on the individual and the leadership culture, so some may never reach quadrant four, or may be there only for brief moments in their career.

I define the four quadrants along the lines of what the CoS is expected to accomplish in each phase. They steadily build the scale of their

	EXECUTIVE	ORGANIZATION
EXECUTION	<p>1 → <i>Bridging to the organization</i> → 2</p> <p>Primary focus of CoS: Using tactical decision making to support execution of CEO's initiatives.</p> <p>Impact on the organization: Ensuring the effective management of operating rhythm (scheduling, content, pre- and post-planning) to demonstrate value of CoS.</p> <p>CoS's role in information flow: The CoS remains in a learning phase, and so should build relationships with different leaders in the organization to study their respective challenges and opportunities.</p> <p>Communication priority of CoS: Learning the communication norms of the CEO and trying to anticipate what might be required of the CoS.</p>	<p>Primary focus of CoS: Coordinating short, medium, and long-term strategy execution on behalf of the CEO.</p> <p>Impact on the organization: Bridging communication gaps between senior leaders, business units, functions, or regions. Starting to demonstrate monetary value of having a dedicated CoS to the rest of the organization's senior leadership.</p> <p>CoS's role in information flow: Monitoring, supporting, and indexing information sharing in favor of the CEO's intent.</p> <p>Communication priority of CoS: Demonstrating an ability to offer insight into the CEO's perspective, but not speaking on his or her behalf.</p>
PLANNING	<p>Primary focus of CoS: Helping manage the CEO's time allocation towards internal and external issues according to an 80/20 rule-of-thumb. In contrast, the CoS should dedicate more time to resolving internal issues.</p> <p>Impact on the organization: Working closely with the CEO to ensure his or her strategic vision and intent are properly communicated and effectively measured.</p> <p>CoS's role in information flow: Establish and monitor the CEO's critical information requirements. Set the CEO's priorities and allocation of focus based on his or her stated objectives.</p> <p>Communication priority of CoS: A CoS should be able to quickly prepare correspondence in the CEO's voice/pen for all audiences, internal and external.</p>	<p>Primary focus of CoS: Coordinating short, medium, and long-term strategy planning for the organization.</p> <p>Impact on the organization: Managing the strategic planning process in the following ways: 1) Identifying decision opportunities; 2) Determining decision space responsibilities; and 3) Presenting key information to and forcing decisions by CEO.</p> <p>CoS's role in information flow: Cascading key decisions after they are made by the organization's senior leadership by: 4) Communicating the decision to the organization; and 5) Monitoring and reporting back on execution/implementation.</p> <p>Communication priority of CoS: Communicating to the organization on behalf of the broader executive team and being a definitive voice within it.</p>
	← 4 ← <i>Becoming a thought partner</i> ← 3	← 3 ← <i>Optimizing decision making</i> ← 2

duties, but the actions detailed in each quadrant are critical to supporting the success of a task-saturated senior executive.

However, a CoS cannot abandon the responsibilities of one quadrant as they move to the next. As the CoS progresses, some of the actions in the previous quadrant(s) may be distributed to other chiefs, or be accomplished organically, but the CoS is still the “owner” of their execution.

Each quadrant has four pieces of subject matter that a CoS *must* focus on and master before effectively executing in the next quadrant. These pertain to how they spend their time, how they engage with the organization, how they impact information flow throughout the executive team and broader enterprise, and the role they play in communications coming out of the executive's office.

Primary focus of CoS relates to the CoS's own expenditure of time; what aspects of work should take up their day. *Intended impact on the organization* considers what the CoS's role should be in the eyes of others within the enterprise; this will prove critical as the CoS moves through the quadrants. *CoS's role in information flow* shows the CoS progressing to increasingly critical roles in the movement of data around the organization and the making of decisions based on those insights; the CoS is not a strategic decision maker but has the positional capability to ensure executives are making decisions with the speed and accuracy that the situation requires. And finally, *Communication priority of CoS* suggests the role that the CoS should play in helping to shape and broadcast the executive's intent to the executive team, broader organization, and outside audiences.

Quadrant 1: Ensure the CEO Is Executing with Efficiency

- *Primary focus of CoS*: Most of the CoS's time is spent getting to understand the executive and ensuring that the CEO's time is being used efficiently and effectively. The CoS is being effective when the executive is no longer a logjam, is on time and *present* for meetings, and has the necessary "white space" to look at the organization's strategic horizon.
- *Intended impact on the organization*: The CoS is seen to be filling a transactional role, ensuring that scheduling, task assignment and follow-through, and meeting content and agenda are all working well.
- *CoS's role in information flow*: The CoS is listening to other executives, understanding their problems, and becoming knowledgeable on their perspectives of the business. Relationship development is key in this phase.
- *Communication priority of CoS*: The CoS is developing an understanding of how the executive prefers to receive and digest informa-

tion, as well as learning the executive's preferred approach for transmitting intent or simply communicating broadly with the executive team or the enterprise. Importantly, the CoS should be looking for gaps in this structure. Are there places where different business units are talking past one another, and how can the CoS help fill these seams?

Don't force your CoS to get ahead of their skis at this point. Forcing them to become a decision maker or forcing them to assert control over other executives will create short-term momentum but undermine the long-term potential utility of the position.

Quadrant 2: Ensure the Organization Is Executing with Efficiency

- *Primary focus of CoS:* The CoS should be spending more time on decisions and actions related to the execution of strategy. This builds, and requires, sustained stability in the executive's schedule.
- *Intended impact on the organization:* The CoS will be seen to begin to straddle the gaps between silos, connecting data and decision points between product teams, business units, regions, or any other bureaucratically compartmentalized areas. This is the starting point of other senior leaders seeing the deep value that could come from the position. The CoS is becoming a selfless, well-placed member of the team who is proactively connecting dots across the organization to the great benefit of other executives.
- *CoS's role in information flow:* At this point in his evolution, the CoS is monitoring the flow of information and assessing where and how it is being used to support strategic intent.
- *Communication priority of CoS:* The CoS should be comfortable representing the executive's views on key topics to a broad range of audiences but should stop shy of interpretation or forecasting. Authorizing a CoS to move to that level should be a conscious decision by the executive.

The goal in quadrant 2 is for other executives to self-discover how the CoS can help the organization function more effectively. The CoS should

be positioned as a neutral broker solely focused on helping the organization execute.

As a senior executive, your goal in developing the CoS's position should be to get your peers comfortable with the coordination efforts that this individual is capable of driving. They must see consistent accuracy when the CoS describes your position on a topic. If you're changing a viewpoint without informing your CoS, you are undermining their credibility and slowing their evolution toward quadrant 4. Your organization must develop trust in the CoS before he can move to quadrant 3. In quadrant 3 the CoS will be positioned to truly shape the decision-making process.

Quadrant 3: Help the Organization Make Decisions and Execute with Greater Speed and Precision

- *Primary focus of CoS:* The CoS is shifting their focus from execution to strategic planning. With trust developed in quadrant 2, and other executives now understanding the impact that this position can have, the CoS can become a focal point for coordination of cross-functional and complex decision making within the organization.
- *Intended impact on the organization:* The CoS is identifying cross-enterprise decisions that need to be made, clarifying decision space, and presenting opportunities for decision to the appropriate mix of executives.
- *CoS's role in information flow:* The CoS is communicating strategic decisions and monitoring and reporting back on their execution.
- *Communication priority of CoS:* Similar to quadrant 2, but now the CoS's ability to represent positions has expanded to the entire executive team. This will give them the ability to communicate with the enterprise, as well as external stakeholders, and demonstrate the clarity of voice and thinking within the C-suite. It is no small step, of course, for the CoS to earn this level of trust from the executive team. In many organizations this will be the most challenging step in this model.

By this point, your CoS has become a thought partner and trusted resource for your executive team. They are not driving decisions, but are

rather identifying decisions that need to be made in support of strategy, passing information among the appropriate executives, ensuring that decisions are made by the right cross-functional leaders, and monitoring progress so that executives can move to the next large issues. Your executives see the CoS as an invaluable member of their network. They trust the CoS to not only represent your voice, as the senior executive, but also their collective voice as a C-suite. The CoS has the ability, therefore, to put down rumors and clarify issues long before they ever reach your desk. They are a truly empowered actor in the organization at this point.

Quadrant 4: Help the CEO Make Decisions and Execute with Greater Speed and Precision

- *Primary focus of CoS:* The CoS has moved through the first three quadrants and now can add great value as a thought partner. They should be spending roughly 80 percent of their time addressing internal matters so that you, the senior executive, are free to spend 80 percent of your time focused “up and out”. For this work, the CoS must be empowered with some level of influence on decisions “down and in” to the organization. Of course, if you’ve helped them navigate quadrants 1 through 3, this should not come across as a threat to the enterprise but rather as a valued asset.
- *Intended impact on the organization:* The CoS’s organizational focus is at the highest levels. Is the executive team allowing daily decisions to pull them away from the organization’s vision? Is strategic focus being lost based on down-and-in issues? The CoS has become the trusted “devil’s advocate” in the room, a critical function that far too many executive teams lack.
- *CoS’s role in information flow:* The CoS can establish boundaries around critical information requirements and ensure that they are supportive of long-term objectives. In other words, what are the pieces of incoming data that should pull the executive team down and into the enterprise, and which should be handled at a lower level so that the CEO can maintain an 80 percent external focus?
- *Communication priority of CoS:* The CoS is able to anticipate the executive’s response on a broad range of topics and prepare correspondence, messaging, and talking points for quick review. In some

areas the executive may authorize dissemination of messaging prior to full review. The CoS has truly become, in this case, an extension of the executive they represent.

Quadrant 4 is the goal that so many executives hope their CoS will reach, but they'll often hire a person who lacks sufficient experience or background to move past quadrant 1 or 2. Alternatively, when they do have a quadrant 4-capable person—and I saw this often in the military—they move that person *immediately* to the bottom left of the model and do not allow time and space for the CoS to develop the sufficient relationships and understanding of the executive culture needed to succeed. This type of CoS may have the ear of the CEO, but without the trust of the other executives and a track record of creating cross-functional value, their impact will be limited.

If you intend to leverage this model, and you are either an executive with a CoS, or a CoS reporting to an executive, I would recommend the following approach.

Both the executive and the CoS should review the model proposed here, then map each quadrant and subsequent line of effort to their own institutional leadership: what is currently going well, what isn't working, and where are the proverbial "blind spots"? Use this mapping as a starting point for a discussion between yourself and your CoS, and discuss a plan for moving forward.

I would then recommend using that mapping as a baseline for periodic check-ins (I'd recommend at least monthly, perhaps more often). At these points, ask yourselves where progress is being made and where you should focus next. If you're an executive, remember that this is a tool designed to help your CoS earn credibility and build relationships with the staff so that they can become your quadrant 4 partner. If you're a CoS, remember that you shouldn't try to tackle every gap at once; start in quadrant 1 and work your way around.

If you do have these types of positions in your organization, ask yourself how you might benefit from tying them together as a social network within the organization—similar to how liaisons could be familiarized with one another. Surely they're connected, but what is that network accountable to achieve? What collective authorities do they have? Most networks like this that I've observed are simply expected to coordinate and deconflict. Even if their members are in quadrants 3 or 4, their empowerment as a connected network can fall into quadrants 1 and 2.

Ultimately, your organization should also have a view on what it is trying to use this position for—as an example, the U.S. military has a long-held vision that has served its chiefs of staff well for generations.

I recall a moment, when I was still early in the job, when I tried to apologize to McChrystal for a mistake the day prior. It was nothing catastrophic, but he'd had a suboptimal meeting with one of the Task Force's outstations the previous night that I'd been responsible for arranging. I had failed to give the team on the ground good insight into how to best structure their briefing to our senior leadership, and the interaction had been less productive than usual—which was my fault, not the tactical team's. McChrystal brushed off my apology.

“Have you ever thought about why we have aides in the military?” he asked rhetorically. “You might think it's so senior officers can have our lives planned out perfectly, but that's not the idea. If I wanted true perfection in this job, I'd hire someone that could stay in my leadership team for my entire tour. Then I wouldn't have to put up with onboarding new people who screw stuff up when they start.”

He smiled.

“The job you're doing,” he continued, “exists just as much for our organization and you as it does for a senior officer like me. It exists, in large part, so the next generation of leaders—officers like you—can see how things function at the strategic level and learn how this machine works. Everything's hard the first time you do it, and you'll make mistakes. I just expect you not to repeat them. But most important, I expect you to learn.” It was a one-time discussion but entirely reframed my view on the job ahead.

Similarly, if you're willing to take this type of approach in your chief of staff model, you'd be investing in the future success of your organization's leadership.

As this book has stated often, today's environment is simply moving too fast for any one individual to sift through the complexity alone. Building a truly empowered team around the executive suite will prove to be an increasingly important value differentiator, in which having a well-considered approach to developing a CoS is critical.