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The Chief of Staff

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About The Typeface

The Chief of Staff is typeset in Financier Display 24 for headings, Untitled Serif 12-15 for sub headings, Untitled Sans 10 for base text and the footnotes are set in Untitled Sans 8.

Financier Display

Financier Display is a serif typeface designed by Kris Sowersby of Klim Type Foundry. It was created for the redesign of the Financial Times in 2014 and later released as a retail font in 2016. Financier Display is available in six weights with matching italics as well as a corresponding text family.

United Serif and Untitled Sans

Untitled Sans and Untitled Serif are quotidian typefaces. Untitled Sans is a plain, neogrotesk sans validated by the ideas of Jasper Morrison and Naoto Fukasawa's Super Normal project.

Untitled Serif is drawn from the old-style of typefaces: the post-Caslon, pre-Times workhorses offered by almost every metal type foundry of the time. Untitled Sans and Untitled Serif are related neither by skeleton nor a traditional aesthetic connection, but by concept only. They have a deliberate aesthetic of not being designed by anyone in particular.

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The Chief of Staff Association

In the modern era, chiefs of staff have uneven access to the global bodies of knowledge that exist within and about the profession. Without a central information repository, there is no structure to guide the evolutionary process and continued growth of the field of study. To rectify this, the Chief of Staff Association, together with leading academics and practitioners, offer The *Chief of Staff* journal; a recognition of the contributions, importance and influence of an intrinsically humble occupation.

The *Chief of Staff* acts as a clearinghouse for data, knowledge, skills and ideas on one of the world's most important but understudied professions. In doing so, we equip chiefs of staff with the tools necessary to expand their knowledge and increase their effectiveness. We provide current and future generations of chiefs with the requisite medium to inspire opportunity and promote the growth and admiration of the role. The journal addresses practical, theoretical and historical aspects of the profession, guiding the analysis of historical decisions and inspiring future leaders. As such, we are interested in submissions that present both contemporary ideas and classic insights.

The Chief of Staff Association (CSA) is the peak international professional body for chiefs of staff in leading corporations, governments, the military and diplomatic corps. Our members have an impact when and where it matters through facilitated connections, professional certification and curated forums. The purpose of The Chief of Staff Association is to advance the influence of professional chiefs of staff and recognise the role of chiefs as connectors of global leaders. Three pillars underpin The Chief of Staff Association. Knowledge, Connection and Community.

Knowledge

The CSA strengthens and enhances the integrity of the chief of staff profession through expert classes, masterclass sessions and its the first-of-its-kind professional certification programme at Oxford University.

Connection

The CSA exists as a hub for chief of staff professionals to advance connections and create the ideal conditions in which influential, long-term authentic relationships can be formed.

Community

The CSA engages a community of peers to share elevated insights and experience, supporting our members' effectiveness in their roles and responsibilities.

Structure

Incorporated in the State of Delaware in the United States of America, The Chief of Staff Association is chartered as a public benefit corporation. A public benefit corporation is a private company that produces public benefits and operates responsibly and sustainably.

Editorial Board

Dr Katherine Firth

MA (Cambridge) MA Ph.D (Oxford Brookes)

Dr Firth is an award-winning and innovative educator. Currently, Katherine is the Academic Coordinator at International House, within the University of Melbourne where she manages the academic program including academic advising, teaching, the library and graduate student academic development. Dr Firth has successfully managed small and large projects, particularly in building digital systems and resources, and in developing collaborations across institutions to support student learning.

Dr Chris Howard

D.Phil.(Oxford) MBA (Harvard)

The eighth president of Robert Morris University, Dr. Howard is a distinguished graduate of the United States Air Force Academy. As a Rhodes Scholar, he earned a doctorate in politics (D.Phil.) from the University of Oxford. He also has an M.B.A. with distinction from Harvard Business School. Dr. Howard earned a Bronze Star for service in Afghanistan, and also served with the elite Joint Special Operations Command and as the Reserve Air Attaché to Liberia.

Dr Carolyn Kissane

Ph.D (Columbia)

Dr Carolyn Kissane serves as the Academic Director of the graduate program in Global Affairs at the Center for Global Affairs at New York University. Dr Kissane is a Clinical Professor where she teaches graduate level courses examining the geopolitics of energy, comparative energy politics, energy, environment and resource security. She serves as the Academic Director for the MS in Global Affairs and the new MS in Global Security, Conflict, and Cybercrime.

Editorial Board

Dr Usman Chohan

MBA (McGill) Ph.D. (ANU)

Dr Usman W. Chohan is an international economist-academic and one of the top 15 business authors in the world, according to the Social Science Research Network. He is the author of *Public Value and Budgeting and Reimagining Public Managers*. *The International Journal of Public Administration* and *Parliamentary Affairs* is among the esteemed journals that have published Usman's work.

Keith Ferrazzi

MBA (Harvard)

Keith Ferrazzi is a #1 NYT bestselling author, who wrote *Never Eat Alone*, *Who's Got Your Back*, and most recently published *Leading Without Authority*. He's an entrepreneur, Founder & Chairman of Ferrazzi Greenlight and an executive team coach to some of the most prominent organizations in the world. He's a thought leader and frequent contributor at publications such as Forbes, Entrepreneur, WSJ, and Fast Company.

Board of Governance

Cassie Crockett

Chair (New York, USA)

Cassie Crockett is Vice President of Talent Engine at Schmidt Futures. In this role, Cassie leads Schmidt Futures' talent programs, as well as overseeing the development of new programs for approval and high-priority partnerships. Prior to Schmidt Futures, Cassie worked for McKinsey & Company, where she specialized in education technology and served as Chief of Staff of the Social Sector Office, and at Pearson, the world's largest learning company. Cassie earned her J.D. from Yale Law School and is a member of the Colorado Bar Association.

Dr Aron D'Souza

Secretary (New York, USA)

Dr Aron D'Souza is a former diplomat, academic and entrepreneur. He was the Honorary Consul of the Republic of Moldova in Australia. Dr D'Souza led PayPal founder Peter Thiel's litigation against Gawker Media involving the wrestler Hulk Hogan, which resulted in one of the largest invasion of privacy judgements in history. He is the editor of *The Journal Jurisprudence* and has a PhD from the University of Melbourne and a law degree from Oxford.

John Porter

Director (Geneva, Switzerland)

John is a UK tech entrepreneur with close ties to Silicon Valley. He holds degrees from Oxford, Sciences-Po Paris, and Stanford. He is Chairman of AML Analytics Ltd and is a key stakeholder in Telos Corporation, a cybersecurity specialist supplying the DoD and AWS. He has served on the boards of both Stanford Graduate School of Business and the Said School at Oxford, he is a Trustee of the Barbican Centre Trust and on the Board of the Verbier Festival.

Board of Governance

Santiago Perez Teuffer

Director (Mexico City, Mexico)

Santiago's strong Latin-American network and diverse business experience between Latin America and the US, provide a valuable edge for him to serve on the Board of the CSA. Santiago has an extensive banking career, and after pursuing his graduate studies at Stanford, went back to Mexico to pursue an entrepreneurial career in the energy industry. Santiago has an MS in Energy from the Stanford School of Energy, and an MBA from the Stanford GSB.

Trent Smyth AM

Director (Melbourne, Australia)

Trent has served as the Honorary Consul for Malawi for eight years and the Secretary of the Consular Corps Melbourne since 2014. Trent is the founder of the Sports Diplomacy Group which assists companies and major events in tapping into diplomatic and Government channels to export their specialist capability through strategic advice and partnerships. Mr Smyth is a Director of the Australian Grand Prix Corporation and holds a Bachelor of Commerce and an MBA from the University of Melbourne.

Certification at Oxford University

The Chief of Staff Association has partnered with Saïd Business School at Oxford University to create the Oxford Chief of Staff Executive Certification Programme. The programme is available only to Members and Fellows and is conducted in-person and at Oxford University over the course of four days.

In addition to the academic syllabus, the programme features insights from invited political, diplomatic and business leaders. These speakers share views on the core competencies of the role and understand emerging challenges. Delegates participate in shared discussion and debate, enriching their perspectives and capability.

Delegates are encouraged – formally and informally – to share best practice and learnings gained in their careers and current roles. At the end of the programme, students not only form strong friendships but also gain a network of competent peers who can act as ongoing sources of advice and professional support.

Programme Director
Rupert Younger

Rupert Younger is the founder and director of Oxford University's Centre for Corporate Reputation and co-founder of The Finsbury Group. He is a recognised expert on how reputations are created, sustained, destroyed and rebuilt and has advised some of the world's largest organisations over the past 30 years.

He is the co-author of the best-selling book, *The Reputation Game* (published in October 2017 and now available in six languages), and co-author of *The Activist Manifesto*, published in 2018.

Membership of The Chief of Staff Association

The CSA is a community of peers who together build strength, confidence and resilience: extraordinary people achieving extraordinary outcomes in locations across the globe.

Levels of Membership

Associate (ACSA)

The CSA Associate Membership program reflects The Chief of Staff Association's determination to build a global community of highly skilled, experienced, and connected chiefs of staff at different stages of their careers.

The CSA Associate Membership programme has been designed in collaboration with members to support the personal growth and professional development of the next generation of chiefs of staff.

Our virtual expertise classes expands your knowledge and refines your skills. Associate membership also grants access to valuable CSA Advisory hours and *The Chief of Staff* journal – a rich source of information and insights from career chiefs of staff.

All Associates receive a certificate of membership, a distinctive Fattorini lapel pin and individualised GMUND calling cards.

Learn from your peers. Grow your confidence and your international network. Commence a rewarding, future career as a chief of staff.

Member (CSA)

Membership is your passport to find, connect with and learn from chiefs of staff who are committed to their craft. Our team provide advice and introductions, confidentially and efficiently, when it counts.

Our knowledge pillar is the most comprehensive education platform designed specifically for chiefs of staff. The Expertise Classes and curated 'Situation Rooms' facilitates peer-to-peer learning that refine your competencies and build your connections.

The CSA Leadership Series brings to life insights from global leaders and senior chief of staff peers who have mastered the profession's nuances through experience.

The Chief of Staff Certification Programme at Oxford University represents the pinnacle of chief of staff specific education anywhere in the world and is available exclusive to members.

Nothing signals to principals and peers more significant commitment to your chosen career than joining your industries' peak professional body.

All members receive subscriptions to *The Chief of Staff* journal, individualised GMUND calling cards, and the highly regarded CSA post-nominal.

"Trust and relationships are the foundations of progress. The Chief of Staff Association is based on this powerful insight and provides a network of authentic relationships along with the credibility and trust needed for growth."

Brigadier General Matthew C. Isler, U.S. Air Force (Ret.)

Letter from the Chief Editor

By Dr Katherine Firth

This volume of *The Chief of Staff* journal focuses on the benefit a chief of staff brings to an organisation. We include articles from sectors where chiefs of staff have long had a presence, such as the government and financial sectors, as well as emerging industries such as technology and humanitarian organisations.

Secretary Leon Panetta, former White House Chief of Staff, makes a claim for strong leadership from chiefs of staff in his Foreword. Tevi Troy, *New York Times* bestselling author, provides compelling examples from the history of White House chiefs of staff.

The volume also continues to highlight the diversity of the role. Chief of staff careers are often marked by flexibility and transitions. John Tuttle reflects on his experience at the New York Stock Exchange marked by both skill and luck, while Ramsey Allington and Libby Dabrowski reflect on the diagonal rather than linear progression of their careers at Google. Enrique Perez considers the transferrable skills a chief of staff needs, drawn from his decade of experience in government, private and social organisations. Phoenix Normand, EA advocate and coach, argues for the capacity of top-performing executive assistants to move up into chief of staff roles, which founder coach Dave Bailey confirms as he unpacks the differences between a chief of staff and an assistant.

Our three feature articles introduce our readers to dive deep into expertise that will help them expand their capacities and challenge them to develop in their roles. Rob Dickins, Chief of Staff to the CEO of Autodesk develops a framework, and offers a formula, to measure the value of a chief of staff. Dr Charlotte M. Farmer, Director for the Center of Programs and Technology Operations, MITRE, convened a conversation with Zachery S. Mitcham and John Kindervag on cybersecurity that relies on 'zero trust'. Karen Keung, Chief of Staff to the Director of HR at the International Committee of the Red Cross reflects on the challenge of balancing equity within a humanitarian organization.

History is shaped by visionary leaders who dare to go where no one has been before, and in the process challenge everyone to rethink what they thought possible. However, what history often fails to recognize is those who supported their visions and guided them from dream to reality. Sir Edmund Hillary was guided by a Sherpa, Tenzing Norgay, when he became the first person to summit Mt Everest. Captain Meriweather Lewis and Second Lieutenant William Clarke were guided by Lemhi Shoshone woman, Sacagawea, on their expedition to map the American West. Dorothy Hodgkin mapped insulin, penicillin and vitamin B12 with the help of her research group.

Today, history is being defined by visionaries who are re-imagining how we can use science, technology and human capital to enhance the human experience and create a better society. Yet the role of a chief of staff is to link principals to their organisations, through their leadership, flexibility, transferrable skills, teamwork, effectiveness, communication skills, and expertise.

Past Contributors

Ms Marcella Allison,
Founder, Titandies

Baroness Valerie Amos CH PC,
Leader of The House of Lords

The Honourable James A. Baker III,
United States Secretary of State (1989-92)

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Ambassador Arthur Sinodinos AO,
Ambassador of Australia to the United States

Ms Betty Yee,
California State Controller

The Chief of Staff as a Strong Leader: A Foreword from Secretary Leon Panetta

By Leon E. Panetta, former White House Chief of Staff

As a former White House Chief of Staff, I appreciate the opportunity to provide some thoughts on the importance of this role.

I believe there is a strong relationship between the quality of leadership required in our democracy and the support of an experienced and loyal staff, particularly a chief of staff. I say this not just as a former Chief of Staff to the President of the United States but as someone who had to lead as an Army officer, as a member of Congress, as Director of the Office for Civil Rights, as Director of the Office of Management and Budget, Director of the CIA, and Secretary of Defense.

There is no way I could have performed these roles without the support of a strong team and top aides who gave me what I needed to lead others. I strongly believe that the purpose of public service is to give others a better life. As the son of Italian immigrants, I often asked my father why he came all of that distance from Italy to a strange land leaving both family and friends. I never forgot his response: 'Your mother and I believed we could give our children a better life.' That is the American dream. But my parents also taught me that dreams are just dreams unless you are willing to work hard, to be disciplined, to take risks, to have courage and to fight to make those dreams come true. In other words, to be a leader.

'But my parents also taught me that dreams are just dreams unless you are willing to work hard, to be disciplined, to take risks, to have courage and to fight to make those dreams come true.'

I often tell the students at the Panetta Institute for Public Policy – an Institute my wife and I established to inspire young people to lives of public service – that in our democracy, we govern by leadership or crisis. If leadership is there, we can avoid crisis. But if leadership is not there, we will inevitably govern by crisis. Today, we govern too often by crisis. And the price we pay is to lose the trust of the American people in our democracy.

The key to restoring trust is strong leadership and the key to strong leadership is a strong chief of staff. I recognize that every leader has unique qualities that play an important role in moving up the leadership ladder. Leaders know how to make decisions but to make the right decisions requires complete and accurate information, an analysis of all consequences, and a plan for effective execution. That is what chiefs of staff are supposed to do. But to make that work requires the following key elements in the relationship between leader and chief:

1. **Trust**. There must be a bond of trust between the leader and his chief of staff. Both have to be honest with one another. And most importantly, the chief has to have the courage to tell the boss when he or she is wrong.
2. **Discipline.** The chief of staff must be a disciplinarian. He needs to establish a strong chain of command, define a specific role for each staff member, and require close supervision.
3. **Policy process**. Critical to the ability of a leader to make the right decisions is the policymaking process that analyses various options for action, discusses all of the consequences, and recommends possible plans of action for consideration. Organizing the staff to participate in this policy process is the job of the chief of staff.
4. **Time management.** Because each day is filled with different and unexpected crises on top of events and other obligations, it is essential to establish a clear schedule both for today and the future. Disruptions are bound to happen, but it is up to the chief to keep the trains running on time.
5. **Loyalty.** It is in the nature of the relationship between a leader and a chief of staff that the leader may make decisions that the chief may disagree with. But it is the leader who occupies the chair of responsibility for decisions, not the chief. It is important for the chief to maintain total loyalty to the leader and make sure that the staff does the same. This can be one of the toughest challenges in the relationship, but in many ways it can determine the success or failure of the bond between leader and chief.

These are some of the important elements of the role of chief of staff, but they work not so much as checks in a box but have to become ingrained in the basic instincts of a chief. It has to come naturally to the individual to implement each element in a way that fulfils the overall responsibilities of the chief and best serves the leader.

Leadership is fundamental to our democracy and to our economy. And in many ways the quality of that leadership will be determined by whether his or her chief of staff is a strong leader as well. We live at a challenging time in our country that will test each of us in our commitment to the American Dream and the future success of our democracy.

Leon E. Panetta was a member of the United States House of Representatives from 1977 to 1993. He served under President Bill Clinton as White House Chief of Staff from 1994 to 1997. Serving under President Barak Obama, he was Director of the Central Intelligence Agency from 2009, and Defence Secretary from 2011. Since retiring as Secretary of Defense in 2013, Secretary Panetta has served as Chairman of The Panetta Institute for Public Policy, which he co-founded in 1997.

Further Reading

Panetta, Leon with Jim Newton, *Worthy Fights: A Memoir of Leadership in War and Peace* (Penguin, 2014).

Directing the Vision: a profile of Ramsey Allington and Libby Dabrowski

Introduction

While some tech companies are just discovering the value of a chief of staff, some of the big names in the business have been well ahead of the game. Libby Dabrowski was Chief of Staff, Media and Technology Solutions at Google eight years ago, a role she later took on at the smart home products company Nest from 2016 and returned to again at Google after leading the integration of Nest with Google Home. Ramsey Allington became a Chief of Staff of Phones + Wearables in February 2020 after nearly two decades working across Google's products.

Reaching out across an organization and bringing expertise together is what a chief of staff does, and these two colleagues in conversation highlighted the many ways that building connections and sharing knowledge have been central to both of their careers.

Navigating the Jungle Gym

Libby Dabrowski defines her career with this quote from Sheryl Sandberg (herself formerly Chief of Staff to US Treasury Secretary Larry Summers, before working at Google and Facebook): 'Careers are a jungle gym, not a ladder.' Always moving diagonally, clambering, perhaps even playing, connecting pipework and ropework, but also always striving for the other side, the top, the next step.

Libby graduated from Northwestern with a degree in Mechanical Engineering, and her first job was working at *Chicago Tribune's* printing press facility where she was responsible for operations management. Experiencing success in this role, Libby jumped to the Interactive division, which at the time was a nascent start-up inside the company, where she was tasked with overseeing advertising operations. Libby acknowledges that her path to Google was a unique one; however, she is keen to point out that her diversity of experience and education has served her well because 'breadth of knowledge is of utmost importance to the COS role.'

Ramsey Allington agrees that breadth of knowledge is essential. He grew up wanting to be a teacher because he enjoyed the process of helping people and watching them grow. He went to college for a 'broad based degree that is common for those who wish to go into teaching' and went on to pursue his Master's in education. While in the middle of earning his Master's, though, opportunity came knocking. At that point, Google was a company of only 300 employees that was shifting from just being a search engine to making money from their advertising business. They needed someone to help build out all those early people and business operations: 'It was a chance to help, not just the company grow into something special, but the people who would come to work for it as well, and something I could not pass up.' His work led him to leading teams in India and Ireland, where Google had some of their earliest base of operations outside of the United States.

Finding Your North Star

Ramsey's description of his role as chief of staff involves looking up to the sky, 'working with my leader to identify what the long-term vision is—North Star—and then mapping out a plan of how we can get there. It is then my job as the chief of staff to identify what people and organizational resources are necessary to execute on this, establish the near-term goals and path in getting to the long-term vision, mapping how we work to create a healthy and inclusive working environment—and help everyone within the team with their part and keep their sight on our North Star.'

Ramsey has made a career at Google guiding leaders through the process of achieving their vision, and then moving on to advise a new leader. What has fulfilled Ramsey most about his career is 'helping visionary leaders during critical moments that matter to them both personally and professionally. It is rare to find a leader with both technical and operational excellence, so to be able to map out the necessary operations and structures to achieve their grand vision is truly rewarding.'

'It is rare to find a visionary who possesses both technical and operational excellence.' *- Ramsey Allington*

Ramsey's experiences in mergers and acquisitions are where he honed his skills in consulting. Ramsey describes a deal 'as being a single moment towards a bigger, strategic vision. The fun comes afterwards when helping the leaders, employees, their operations, and products thrive within Google. Integration involves identifying what aspects can Google bring to accelerate the acquired team and the strategic vision, what exceptions are needed to nurture this inorganic moment, and what about this team is unique and Google should learn from and invest in.

Anchoring Everything in the 'Why'

Libby's metaphors for how to orient a team towards the vision are about weight and flow. 'It is important to ground the vision in why and then communicate the why to everybody involved so that the people making things happen understand what they are working towards and why it is important.' Libby sees herself 'as a conduit between the organizational leader and their team—to contextualize and operationalize the overarching strategy set by its leaders and enable the broader team to confidently and effectively execute against it.'

'It is important to ground the vision in why, and then communicate the why to everybody' *- Libby Dabrowski*

Communication and connection were essential to her success when Libby led the integration of Nest with the Google Home team. Nest was a company founded by ex-Apple employees and most of the team had also previously worked at Apple, which has a strong top-down culture.

Libby had previously switched between organizations and departments within Google to guide leaders and teams through times of great change, and she channelled that experience to drive alignment across the full spectrum of the business—from its mission, to operations, and culture. Libby considers her success in integrating the two organizations under one brand with one shared vision to be 'the proudest moment of my career.'

In her role now, Libby's work is highly cross-functional, collaborating across product areas to deliver differentiated Google experiences on first-party hardware. This requires actively building new ways of working and 'back-channelling with other chiefs to get things done and marshal the necessary resources to achieve shared goals—while always anchoring what I am asking of people in the why.'

Conclusion

The flat organizational structure of Google and many other tech companies supports a culture of innovation where leaders are encouraged to 'dream big' and 'go for it.' With this structure emerged a need for chiefs of staff; intensely organized yet intensely creative problem solvers who can work with their leader to forge a path from dream to reality.

Libby Dabrowski and Ramsey Allington use different metaphors to describe their approach to their roles, but they agree on what their roles are for and what is needed for their teams to succeed. In a networked age, networked organizations challenge the chief of staff role to work not only vertically but horizontally—to connect leaders to their teams, but also to connect and merge teams together, working through formal and backchannel routes, reaching out to other chiefs of staff, and integrating cultures. Navigating the jungle gym of the organization has matched the route of their careers. Their roles have sometimes been called chief of staff, sometimes they have been called Director, Head or Senior Manager. But they have always brought guidance to their leaders and to their teams.

Ramsey Allington has been at Google since 2002 working across Corporate Development and Operations in Business and Engineering teams - currently chief of staff for Phones and Wearables business.

Libby Dabrowski joined Google in 2008 and has worked in six different divisions during her tenure. She is currently Chief of Staff for Nest, where she oversees the portfolio-level strategy for Google's smart home products.

References

1. Sandberg, Sheryl, *Lean In: Women, Work, and the Will to Lead* (Ebury, 2013).

Further Reading

Sadun, Raggaella, 'Google's Secret Formula for Management? Doing the Basics Well', *Harvard Business Review*, https://hbr.org/2017/08/googles-secret-formula-for-management-doing-the-basics-well (24 August 2017)

Skill and luck at the New York Stock Exchange: a profile of John Tuttle

John Tuttle broke one ankle and then another in his early twenties, and neither happened while playing his beloved football. He hasn't broken anything since as he's climbed the ladder from a White House intern to the New York Stock Exchange.

Tuttle currently is Vice Chairman and Chief Commercial Officer for NYSE Group. He joined the NYSE when he was twenty-five, accepting an offer from a mentor who asked him to spend 'just six months' on Wall Street. Now, at thirty-nine, 'I'm one of the most tenured people here,' Tuttle joked.

Spend just a little time with Tuttle and you find he has that mix of intelligence, humility and humour that makes him impressive. He's also the type of person who aspiring chiefs of staff ought to pay attention to; his personal and professional paths that led him to where he is now serve as important reminders that skill and luck contribute to success.

He recalls his early twenties being a period when 'I was in a hurry, but I just didn't know where I was going.' That impatience came with a valuable lesson for him that he can share with others: Demonstrate excellence in everything you do, and people will notice. And then don't be surprised when those people call, perhaps when you least expect it, and offer you a tremendous opportunity.

He has received two such phone calls.

Tuttle received the first one soon after graduating college, asking if he'd join the State Department. Someone who mentored him during his days as a White House intern had moved to the State Department, and he knew there was something in Tuttle that would make him the right fit for a position there. Oh, and that mentor wanted Tuttle in Washington in less than a week. Obviously, Tuttle accepted.

Tuttle's first day on the job also was the first day Condoleezza Rice was Secretary of State; although Tuttle spoke only briefly about her during a recent interview, it's quite clear he maintains a deep admiration for Rice. He stayed only a couple of years at the State Department, before leaving to pursue his MBA, but in that time, he witnessed Secretary Rice and her team deal with incredibly powerful and sometimes awful moments in disparate challenging places such as Kosovo, South Sudan and Kashmir while also celebrating some of humanity's best potential at the 2006 Winter Olympics.

His phone rang again as he wrapped up his MBA. On the other end of the line was another person who had watched him deliver on that promise of excellence while Tuttle was at the State Department. He asked Tuttle to come to New York to assist in what Tuttle now calls the 'biggest transformation' in the NYSE's 200-year history, as it moved from 'a quasi-public utility' into a 'for-profit, publicly traded, multi-asset class and multi-geography class' organisation. Tuttle took on the task, presuming he'd be in New York less than one year.

Remember, that was fourteen years ago.

By 2013, he had become the Chief of Staff for the Exchange's CEO. His years in that role provided him the chance to offer a master class in how to succeed in that position.

Most importantly, a top-notch chief of staff—whether he or she is operating in the public or private sector—must put the institution and the principal ahead of any personal ambition. A 'high curiosity quotient' also is essential, Tuttle says, because you must see the potential connections between organisational units even when the leaders of those units don't. Tuttle maintains that chief of staff must know what each unit does and needs and how it might be improved. You get a 'holistic view' of an organisation, and the only other person who also gets that is the CEO, he adds.

Next, being honest—with everyone—is a must. 'You have to do your job knowing some groups will not always get what they want,' Tuttle said. Chiefs of staff are the eyes, ears and proxy of the CEO, Tuttle maintains, and that means they might at times have to remind a disappointed colleague that they're delivering the same message the CEO would if that principal were standing there.

'You have to do your job knowing some groups will not always get what they want.'

Being honest also carries over into the relationship with the principal, according to Tuttle. 'Your principal needs someone who tells it straight, but is also right,' he said. 'Direct feedback' is essential, Tuttle added, and he maintains every professional, no matter his or her title, needs that.

A successful chief of staff also must be a voracious consumer of quality information, which then must be synthesized for the principal. Of course, there will be times when necessary information can't be immediately uncovered. When those moments happen, there's only one correct course of action: Pick up the phone and get in touch with the person who knows. 'Call the governor or whoever it might be,' Tuttle says. 'Start at the top of the food chain, not the bottom.'

While the Rolodex itself might be a bit antiquated these days, the value of a network never will be. Tuttle discussed the importance of his network in multiple ways during a recent interview. One theme rang through in all those references to his network: Leverage it, every single day. In an era in which news comes at us instantaneously and through multiple channels, conflicting information is inevitable. The individuals in our respective networks can assist in making sense of the data or the resources we need.

Tuttle's how-to-succeed-as-a-chief-of-staff list ends with this: 'You don't get anything done unless you're in the office, but you don't learn anything unless you get out of the office.'

Tuttle considered there are some attributes elite athletes and chiefs of staff share. 'They love to win; they are intellectually curious; and they are willing to grow,' Tuttle said.

For Tuttle, growing meant stepping away from a chief of staff role.

In 2016, Tuttle's trajectory within the NYSE again changed when he was tasked with heading the global listings unit. As chief of staff, Tuttle had what he called 'a 10,000-foot understanding' of what it did, but now he needed to be 'under the hood' and lead necessary change. Subsequent promotions have followed, and Tuttle believes that he's taken one valuable concept learned as a chief of staff into all those roles: 'Have a view, have a view, and have a view.'

Because of his age and impressive resume, the inevitable question about what's next hovers over Tuttle. He laughs off such talk, saying that 'I have no idea what I'm having for dinner tonight, but I do know what my principal is having.' But soon he becomes introspective.

The New York Stock Exchange 'is a very special place,' Tuttle says, and it's undergone two major transformations during his time there. He acknowledges that the Exchange's biggest challenge is to ensure that entrepreneurs and investors can more effectively be brought together. Tuttle believes 'talent and intellect are equally distributed', but that the same cannot be said for opportunity. 'We need to democratize opportunity,' he says so that any person anywhere in the world can find that right person and that right moment to turn an idea into a potential life-changing venture.

Excellence. It's what drives Tuttle. 'Excellence is the only thing worth waking up for in the morning.' Excellence, and perhaps those chances to watch his beloved football throughout the fall.

John Tuttle is Vice Chairman and Chief Commercial Officer for NYSE Group, a wholly-owned subsidiary of Intercontinental Exchange, Inc. (NYSE: ICE). As member of the senior leadership team, Tuttle leads NYSE's Global Listings, Capital Markets, and Exchange Traded Products businesses, and is responsible for managing the Exchange's relationships with more than 2,300 NYSE-listed companies and with the Investment Banking, Private Equity, Venture Capital, and Legal communities. In addition, he leads the NYSE's business development efforts for Initial Public Offerings (IPOs), Direct Listings, Exchanges Traded Funds (ETFs), Structured Products, Closed-End Funds, and REITs listing on NYSE or NYSE-American.

The Transferable Skills of a Chief of Staff

By Enrique Perez

You're sitting with others and the conversation turns to your professional occupation. You share that you're a chief of staff—which, depending on the audience, may draw some well-intentioned but curious stares. While the role has existed for some time, albeit under different titles, mostly in the public sector, and the responsibilities can range based on the needs of the principal (CEO, Secretary, Chairperson, etc.) and organisation, it can still seem like a 'black box' to many or draw innocuous comparisons to Leo McGarry's character in the television show, 'The West Wing.'

Moreover, the stakes are arguably higher when this conversation is in a professional setting; perhaps you're giving thought to your career and next role. How do you explain the role during an informational or job interview? For most aspiring job applicants, their ideal thirty-second elevator pitch doesn't require the first ten seconds being dedicated to a flash explanation of the chief of staff role. What can you focus on? How can you relay the value you would contribute to an organisation?

As much as I would like to relay certainty, given the specific responsibilities a chief of staff may have at differing organisations, the answer is: it depends. Your focus, however, should be on your transferable skills. Essentially, consider which skills from your chief of staff role can also be used in a future role and throughout your career. While there are specific quantitative and qualitative skills which may be in play, perhaps the greatest skills gained in the chief of staff role align with any organisation's most valuable asset—its human capital. While not an exhaustive list, below are some skills you may have gained and honed during your tenure as a chief of staff which can serve you, and a future organisation, well in the future.

Connecting dots

To be sure, this is not a technical term, but a chief of staff often has a unique seat allowing them to have insights across the organisation. With some experience, the ability to anticipate problems or see gaps needing to be filled grows to a point where they can propose and help create solutions before an issue reaches critical mass. This can include mediating potential and actual disputes between parties; navigating uncertainty and exercising the adaptability required to get from start to finish; and perhaps, most importantly, handling issues before they rise to the principal by resolving matters early.

Interpersonal Communication & High EQ

This set of skills are far-ranging, but have served you well in your role and will in subsequent roles. To start, your written, verbal, and non-verbal skills have been honed over time in carefully crafted emails and memos, phone conversations, and meetings. Learning, and later knowing, how to read a room—or table—of people has become a valuable input for how you interact. You've also learned the value of listening first and speaking last, especially when you are representing the principal to others.

As a chief of staff, you are exposed to and interact with a wide variety of stakeholders. You have gained the ability to influence others up and down the organisational chart—not only because you happen to be the chief of staff, but because you've learned that relationships matter. This extends to your role when representing the principal to external stakeholders, including when respectfully relaying what they may not want to hear.

The collaboration required in your role, and future roles, is key. Again, this includes across the organisational chart, including for initiatives or projects which don't have a clear home. When charged with something by the principal, it is also incumbent upon you to discern what to funnel, filter, and curate for what the principal needs to know and when—which can certainly vary by principal. For instances when the principal is engaging on a matter at hand and collaborators are seeking their time, gatekeeping on your part can also play a role of what to gather and relay or whether time for direct collaboration is needed.

'You act as a needed sounding board—with the ability to disagree.'

Finally, you've convincingly become comfortable with the uncomfortable situation of 'speaking truth to power.' You are a confidant to your principal, including knowing and understanding what is confidential and what is not. Moreover, you act as a needed sounding board—with the ability to disagree. To be sure, any disagreement you may have becomes secondary to what decision the principal eventually makes. Yet before that, during their decision-making process—where you also hone your decision-making ability—you play the crucial role of the traditional Devil's Advocate, even when you personally agree, to help anticipate issues, stress-test arguments and assumptions, and ask questions no one is asking or doesn't want to ask.

When advising principals, and sometimes considering the organisation as a whole, helping prevent mission creep into non-critical areas can take courage to address what might otherwise be a drain on time and resources, no matter how much of a pet project it may be in the eyes of the beholder.

Getting Things Done

Sometimes this simple explanation of your role can be best. You are accustomed to high accountability across the organisational chart—including the issues which, having no clear or easy solutions, reach your desk and you must act. This includes, across a scope of responsibilities, being a stop gap if something isn't getting done, or even filling an open position on an interim basis. Your unique seat has provided you a birds-eye view and detailed understanding of the strategic and operational elements of your organisation, which has allowed you to learn how to zoom in and zoom out. In some respects, this may be your greatest contribution and value to the principal and organisation, as you are relied upon to help move the needle forward. This includes how you complement the principal—as much as you are learning from them, they are also likely learning from you, all of which is better for the organisation and ability to execute.

Leadership

You can read all you want about leadership—and I encourage it—but your real abilities here are honed when practicing it. As a chief of staff, this often involves putting your interests aside to serve the principal and organisation. This learned humility is fostered through the behind-the-scenes work you do, not seeking attention for it and focusing on Getting Things Done. Sometimes this can lead chiefs of staff to not highlight their accomplishments or role in subsequent settings, so some mindfulness around this can be beneficial.

In order to succeed in your chief of staff role, and in future positions, you will have to be an honest broker. Throughout the organisation, especially with those with whom you will have repeated interactions, this takes trust—which can also take time. Honing this skill now will pay dividends in the future, as your reputation will precede you moving forward.

Finally, your leadership also takes the form of modelling behaviour for the organisation as an extension and representative of the principal. Yes, you have imperfections and will undoubtedly trip up from time to time, but the concerted effort you have made is subsequently reflected in others.

What Comes Next

For me, those well-intentioned curious stares I shared earlier came from my parents. My initial attempt to explain my work was futile—reading my to-do list out loud helped them better understand my role and provided me the impetus for figuring out how to better communicate what value I contributed as a chief of staff.

I've been very fortunate to have been a chief of staff to multiple principals, including across political parties. I look back at the experience and whatever small contributions I made with great fondness. For me, I've been able to transfer those skills to serve others in my long-time passion of personal finance. Now, having my own firm as a financial advisor and investment manager, I spend my time helping clients navigating and adapting to uncertainty, listening a great deal to collaboratively help them determine their financial goals and work towards them, acting as a judgement-free sounding board in seeking to instil confidence in their decision-making, analysing and communicating about potential investment vehicles, and choosing to be a Registered Investment Advisor where I am legally obligated to put my clients' interest first. While my clients range from recent college graduates to pre-retirees, each represents a principal where I am proud to stand by them as the chief of staff for the financial elements of their lives.

There are certainly other transferable skills, including more specific ones, which can help you transition to what comes next. The two keys I would offer for your consideration are (a) giving thought to what your skills are and how they, in fact, translate to specific roles, and (b) to focus on how you will highlight your accomplishments. For the latter, this may include starting to track your accomplishments now; simply listing your chief of staff job specifications won't demonstrate the value you can bring to another organisation. Your being a chief of staff has been valuable to many—it is up to you to help translate it into how you can contribute and succeed in whatever it is you want to do next professionally.

Enrique Perez is currently the Managing Principal of Mission Park Capital, based in Cambridge, MA. From 2006–2012 he served as a Deputy Chief of Staff and Chief of Staff to four Undersecretaries of Business Development and a cabinet-level Secretary of Housing & Economic Development for the Commonwealth of Massachusetts. He subsequently served in Chief of Staff roles in the private and social enterprise sectors from 2014–2016. He holds an MBA (Yale School of Management) and BA in History (Williams College).

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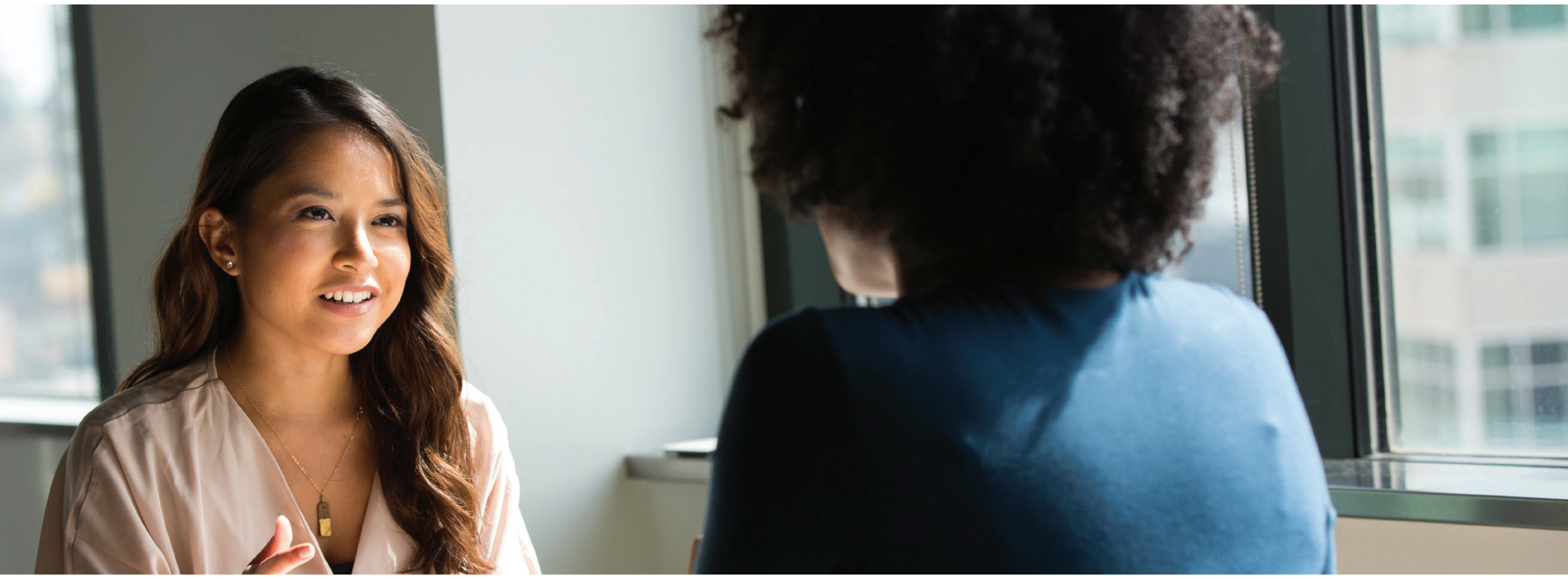

Is Chief of Staff Truly the Next Step for Top-Producing EAs?

By Phoenix Normand

As a long-time executive assistant advocate, coach, mentor and career EA with twenty-eight years in the seat, the number one question I get from EAs is, 'What's next for us?'

The chief of staff role has exploded in popularity over the past three years. Companies and CEOs are now recognising the insane amount of value a chief of staff brings to the organisation, especially when there's synergy with the highest-ranking executive assistant in the building. This duo has proven to be the secret weapon for quickly scaling companies and the legacy players looking to modernize their approach to managing their teams effectively. But the question remains: is chief of staff the next step for a top-producing EA?

A Brief History

In years past, companies wouldn't even consider a candidate for the chief of staff role who didn't have a certain level of education, typically from a brand-name university, years of experience in the C-suite, even having owned businesses of their own. In addition, the chief of staff role was often misunderstood and misperceived by others as yet another blocker to direct contact with the CEO. However, as C-suites got younger and more flexible, with CEOs who went from engineer to 'Big Cheese' seemingly overnight, the chief of staff role began to make more sense and became a conspicuous contributor to younger CEOs and their company's success.

Similarly, the EA role has suffered from mischaracterization thanks in part to inaccurate and condescending portrayals of executive assistants in film and television for decades. Businesses themselves have largely viewed this role as an accessory instead of an essential role. Worse, EAs have done an extremely poor job of rewriting and owning the narrative about the role vs. accepting the incorrect, pervasive one that still exists today.

What Differentiates an Executive Assistant from a Chief of Staff?

When reading a chief of staff job description, especially as an EA, many feel as if the job description fits a majority of what they do already. There is a perceived overlap in some of the core competencies and daily accountabilities of both roles. Both roles require experience, or specific C-suite exposure, that most top-producing EAs have to some degree, although not to the extent required to become a viable chief of staff candidate. There are often some educational disparities, however, even those lines are beginning to blur as more EAs are showing up with Masters' degrees from top universities, similar industry exposure, and business acumen that rivals even the best chiefs of staff, with the nuanced advantages of empathy and the relationships they've nurtured with virtually everyone in the company.

If I were to explain the core competencies of each role as simply as possible, I'd put it this way: Executive assistants keep the train moving seamlessly down the track while chiefs of staff help plot the course and ensure the train reaches its destination on time.

Handling all-things-administrative is the superpower of a great EA. Overseeing all-things-operational while leveraging those administrative superpowers is what makes the EA/chief of staff relationship a true secret weapon within any organisation. However, when there's discord among those two entities neither can be effective nor truly perform to their potential.

What's Next?

There is a new breed of EA emerging who are destroying the old narrative and commanding (and getting) a seat at the table. They have a very clear understanding of the game, the players, the rulebook, and the strategy required to win, just like the executives they support. This has allowed the top-performing EA edge-cases to execute at a similar level as the C-suite, leverage their years in the seat typically in numerous industries, and provide a diverse and much-needed perspective of the business as a whole. Remember, Executive assistants have relationships up and down the chain of command, something rarely achieved by the C-suite. When empowered and leveraged correctly, they truly become that one, reliable resource who can accurately speak about the overall health of the team.

'There is a new breed of EA emerging who are destroying the old narrative and commanding (and getting) a seat at the table.'

Unfortunately, this specific group of EAs max out professionally at EA to the CEO. While the role is fraught with unparalleled access and opportunity, more than any singular role within the company, it's still hampered by a glass ceiling that doesn't exist in other roles. Worse, when Executive assistants seek other roles within the organisation at the senior, director level and above, they are routinely passed over by the company and recruiters even though they have the passion, business acumen, exposure, and innate ability to figure it out and thrive. This has resulted in many high-performing EAs chained to roles below their capabilities while watching their co-workers fill the very seats they sought, with little resistance. It's incredibly demotivating, unfair and, sadly, all too common.

The sunny side of this is the fact that chiefs of staff have levels. There is no longer a one-size-fits-all narrative about the chief of staff role that often disqualifies a top-performing EA from the jump. Some companies are beginning to hybridize the EA/chief of staff role as a way to provide professional development beyond the EA to the CEO role, benefitting from the core competencies of each.

Additionally, organisations like The Chief of Staff Association have created an actual curriculum that provides the opportunity for top-producing EAs to increase their business acumen, knowledge, and capabilities. At no time in the past was this available or even a consideration. It now provides EAs with a very focused educational track and a definitive career path for those truly looking to excel beyond the role. And, most importantly, it re-instils the hope that may have been lost in the numerous concussions suffered from constant contact with the transparent ceiling above our heads.

A Personal Story

After five years as a CEO of my own business, traveling the world thirty-plus weeks per year teaching workshops to top-producing EAs in numerous industries, and chairing my own global community of EA superstars, I decided to sunset my business and return to the seat. Many would view this as failure to some degree. And, I admit, I had a certain level of anxiety around how I would be perceived by my CEO peers once word got out that I'd bequeathed the title. However, something very specific allowed me to rationalize the decision and take the leap. I'll explain.

I hosted a webinar with the head of a local chief of staff organisation. It was easily one of my most-viewed online webinars. My goal was to finally dispel the myth around whether or not the chief of staff role was a natural progression for a top-performing, C-suite EA. Having taught, coached, and mentored EAs in numerous industries and several countries for the past five years I thought it was important to finally and definitively answer the question with a top-performing chief of staff brave enough to take it on. To my delight he did exactly that and validated everything I'd counselled EAs, for years, around this question.

As a result, I really wanted to put this theory to the test. And since COVID had essentially neutered my business once international travel was halted, I decided to re-join the EA ranks with the express intent of eventually becoming a chief of staff, thus proving it was, indeed, possible. I recently joined an amazing tech start-up led by an incredible CEO and vowed to learn everything I could about the business in the shortest time possible and contribute at an incredibly high level by leveraging the experience and acumen of running a successful business of my own. This story has no ending since I'm only two months into the role, but I know I've already made a conspicuous impact in the C-suite and continue to have an impact throughout the organisation as we rapidly scale.

I’m excited for the opportunity to be a conspicuous example of a top-performing executive assistant who put in the work to eventually become a chief of staff. There’s no better way to prove a point than to roll up your sleeves and actually get it done. And I’m confident I will achieve my ultimate goal: the title of chief of staff. Then, I’ll likely write another book, scrap it all, and start another new company of my own.

In Conclusion

So, to answer the original question: Is chief of staff the next step for top-performing executive assistants? Sure, but with a big caveat. For example, young lawyers must start at a junior level and work their way up the ladder until they achieve their ultimate objective: Partner. Executive assistants eyeing the chief of staff title must do the same. Otherwise, without putting in the work and having long-term commitment, the chief of staff role will continue to be unattainable for many. Fortunately, The Chief of Staff Association has created the perfect roadmap and opportunity to convert a long-time dream into an attainable reality.

Phoenix Normand has been a top-producing, C-suite Executive Assistant for 28 years. He’s a top-rated trainer for EAs and teams, an international keynote speaker, and author of the book “AS I SEE IT, Business: Volume One.” His no nonsense workshops, speeches, and writing style have made him an authority in the Executive Assistant space and an exciting, future addition to the chief of staff community.

Further Reading

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The Role of the Chief of Staff in Managing White House Conflict

By Tevi Troy

The White House is a famously fractious place, with infighting taking place to varying degrees in every presidential administration. To combat it, presidents have a number of tools at their disposal, with the top one being the appointment of an effective chief of staff. Unfortunately, as a number of presidents have learned to their chagrin, some chiefs of staff have-not seen their role as being in charge of controlling White House infighting but have instead contributed to it.

When Harry Truman was president, he had a *primus inter pares* assistant to the president named John Steelman; Steelman is considered by many the first chief of staff although he did not officially have that label. Truman was followed by Dwight Eisenhower, who had a military background, and started the practice of having a chief of staff, former New Hampshire governor Sherman Adams. Ike valued organisation, as he thought that ‘disorganisation can scarcely fail to result in inefficiency and can easily lead to disorder.’

Ike’s innovation of a chief of staff ended after his presidency, in part because Adams was forced to resign in the so-called ‘vicuna coat’ influence-peddling scandal. Neither John F. Kennedy nor Lyndon Johnson would have one. But Richard Nixon, who had served as Ike’s Vice President, brought back the position when he became president after winning the 1968 election. Nixon had an expansive view of the role. According to Nixon, the White House chief of staff’s office was aware of the president’s desires and was willing to enforce them. Larry Higby, a top aide to Nixon’s powerful chief of staff H. R. Haldeman, recalled the dictum that ‘policy was going to be decided in the White House.' Given that clear marching order, the chief of staff's office understood that it 'was the job of the cabinet to execute. And there were mechanisms put in place to make sure that follow-up and execution did take place.'

Unfortunately for Nixon, his chief of staff also became embroiled in scandal and would serve eighteen months in prison for his role in the Watergate scandal. The imprisonment, as well as Haldeman's imperious nature, would further tarnish the role of the chief of staff, with implications for the next two presidencies.

Gerald Ford, who took over for Nixon, was widely seen as too nice for the job, and needed someone tough to ride herd on his White House staff. The first aspirant was Al Haig, a four-star general who had already been serving as White House chief of staff under the departing Nixon. It did not work. Among other problems. Haig could not get along with Bob Hartmann, a hard-drinking former journalist who served as Ford's speechwriter, political counselor, and vice-presidential chief of staff, who had the advantage of longstanding ties to Ford.

The Hartmann-Ford relationship did not sit well with Haig. Even before the transition, Haig, angered at Hartmann's leaks to the press about him, grabbed a Hartmann aide by his collar and snarled, 'If you have any influence over that fat Kraut, you tell him to knock it off or he's going to be the first stretcher case coming out of the West Wing.'

The two men intensely disliked one another. As Richard Norton Smith said in an oral history interview with David Gergen, 'One senses that Hartmann and Haig were put on the planet to piss each other off. We talked to Haig before he died, and the thing that got him red-faced with anger, thirty-five years later, was Hartmann.'

The situation with Haig and Hartmann sniping at each other was untenable. The two men were regularly leaking negative information about one another to the press. As Ford press secretary Ron Nessen, whom Hartmann had brought into the administration, recalled in his memoir, 'Hartmann was 'knifing' White House Chief of Staff Alexander Haig in anonymous conversations with reporters.' Haig knew about it and even told Ford directly, 'You've got to get this guy under control. Otherwise, I can't serve you.' He was right. Haig was gone on September 21, five weeks after Ford became president, and was quickly appointed as Supreme Allied Commander Europe in December.

With Haig gone, the White House needed a replacement who could try to make the Ford White House run. This role would fall to Donald Rumsfeld, who served in the House with Ford before becoming his White House 'staff coordinator'—the aversion to Haldeman's style as chief of staff extended even to the title. Rumsfeld was a talented bureaucratic operator. Yet, according to Nessen, infighting among staff members became even more complex and divisive, with Rumsfeld's coterie, the Hartmann faction, and National Security Adviser Henry Kissinger's team engaging in a 'daily struggle for influence.' As for Nessen, he found that the feuds were so intense that neutrality was not a choice: 'I tried to stay out of the never-ending staff feuds. But that was not possible.'

'I tried to stay out of the never-ending staff feuds. But that was not possible.' - Ron Nessun

Given the challenges of his predecessors, it is not surprising that Ford's successor Jimmy Carter wanted to avoid having a chief of staff. In the wake of Ford's recent experiences with Haldeman, Haig, Rumsfeld, and Dick Cheney – who took the job when Rumsfeld became Defense Secretary – Carter was leery of even having a chief of staff. The anti–chief of staff animus was so great that one Carter administration official joked that 'the only thing I know about Dick Cheney is that he has a nice wife.'

If the decision not to appoint a chief of staff was based on a reaction to earlier administrations, the wrong lesson was taken from the wrong administration. Carter clearly did not like what he saw from the Haldeman model in the Nixon administration, but the constant infighting of the Ford administration should have proved instructive as well. Even with a chief of staff in place, Ford's spokes-on-the-wheel system, in which multiple aides reported directly to the president, led to endless strife and constant turf battles. Cheney's welcome note warning to Carter strategist Hamilton Jordan, 'beware the spokes of the wheel,' was an apt one, and advice Cheney had given Carter transition director Jack Watson as well. It was also, adviser Stuart Eizenstat recalled, 'one piece of advice from Cheney we would have done well to follow.'

Carter's decision to forgo a chief of staff would have immediate implications. As Watson saw, the anti–chief of staff rhetoric 'might have sounded pretty good in the campaign for the presidency, but it just doesn't work after the inauguration.' Watson was adamant on the point, concluding that 'it is an absolute necessity to have a chief of staff.'

For the Carter White House, not having a chief of staff meant that no one on the staff was in charge. On the very first day of the Carter administration, the staff had no idea who should run meetings. Carter lawyer Robert Lipshutz, the group elder, tried to assert himself, saying, 'I guess because I'm the oldest one here, I'll call this meeting to order.' It did not work. While indeed older, he did not have the respect of the staff and was mostly ignored. Instead, Frank Moore, a Georgian, asked Jordan, 'Ham, what do we do now?' He got no answer. After another staffer asked, 'Should we have a staff meeting every day?' Jordan finally said, 'We'll have a meeting when there's something to meet about.' After they meandered on for a while, aide Mark Siegel wondered, 'My God, what would the KGB think if they could see us now?' Carter had not wanted a chief, and now that his administration was in place, he did not have one, with all of the implications that decision brought.

Carter's successor Ronald Reagan also faced challenges in selecting a chief of staff. Reagan, however, did not object to the title itself. Reagan's challenge was that he was not sure who should have the role. Ed Meese, who had held senior roles with both Reagan's gubernatorial staff and his campaign staff, was seen by himself and the outside world as the presumptive candidate to serve as Reagan's chief of staff. Some of his fellow Reagan insiders, however, did not see the disorganized Meese as the right person to serve in the top management job in the White House. Leading the charge against Meese were long-standing Reagan aides Michael Deaver and Stu Spencer. Spencer was particularly adamant on the point, telling Reagan a week before the election, 'Ed cannot be chief of staff. He's not organized.'

Given the need and desire for a chief of staff, the Meese critics needed to present an alternative to succeed. The only realistic choice was James Baker, who had served as campaign manager for George H.W. Bush, Reagan's vice president. While Baker was an obvious choice from a skills perspective, picking him had its challenges. According to Congressman David Stockman, who had helped the Reagan campaign debate preparation efforts, inner circle Reaganites saw Baker as 'tainted goods,' having served as campaign manager for two moderates, Gerald Ford and George Bush.

Despite this hurdle, Baker got the job. According to Baker, Meese, feeling slighted, took the news of Baker's appointment badly: 'Meese was down. Meese was very down.' Spencer, who set matters in motion, went further, recalling that Meese 'went *ape sh*t*' over the move.

Reagan, astutely recognizing the blow to Meese's ego, had even asked Baker to 'Make it right with Ed.' Baker being Baker, he had a multi-part plan for co-opting Meese. He planned to keep a low profile as chief of staff. As the *Christian Science Monitor's* Louis Sweeney wrote in a puff piece on Baker shortly after his appointment, 'You won't see his Stetson showing over the rim of the hill too often.'

Baker also gave Meese clear areas of responsibility. While Baker got the chief of staff title, Meese became 'Counselor to the President for Policy.' Baker also granted Meese cabinet rank, which Meese considered vital. Under the terms of their arrangement, sketched out in a famous chart, Meese ran the policy councils and could take part in cabinet meetings, while Baker took control of legislation, press, and paperwork. Baker's responsibilities encompassed 'Coordination and supervision of White House Staff functions,' 'Hiring and firing authority over all elements of White House Staff,' 'Coordination and control of all in and out paper flow to the President and of presidential schedule and appointments,' and the ability to 'Preside over meetings of White House Staff.' Overall, he told Meese, 'You've got the policy; I'll just make the trains run on time.' The arrangement flattered Meese, but what it really did was leave Baker in charge.

In Reagan's second term, Baker left to become Secretary of the Treasury. Replacing Baker as chief of staff was Donald Regan, who had served as Secretary of the Treasury in the first term. This job switch proved to have serious drawbacks. Regan, in contrast to Baker, was a feuder. He quickly got off on the wrong foot with Robert 'Bud' McFarlane, the national security adviser. On March 24, 1985, Soviet troops murdered a U.S. Army major in East Germany. McFarlane awakened Reagan to alert him, but without telling Regan. The new chief of staff yelled, 'I'm in charge of running this place and I need to be kept informed.' McFarlane acknowledged he was wrong, but also defended himself, replying, 'You're right you should've been informed, but I'm not gonna stand here and put up with abuse of this kind.' Regan, a former Marine Corps officer and decidedly not a diplomat, escalated matters, saying, 'Well, I'll run the place the way I want and you'll goddamn do it the way I say to do it.'

Regan later apologized to McFarlane, but relations between them never recovered. Even worse than butting heads with McFarlane was running afoul of first lady Nancy Reagan. Regan did not grasp what long-serving staffers called 'the Sacramento rule: 'A Happy Nancy means a happy governor.' The worst violator of this rule would be Regan, whom Nancy described as liking the sound of 'chief'—but not 'of staff.' He ended up being fired shortly after an argument in which he hung up on Nancy, something that Baker joked was 'a hanging offense.'

Reagan successor George H. W. Bush would also have a feuding chief of staff – former New Hampshire governor John Sununu. Sununu had an infamous temper that, married to his territoriality, created serious problems. Before the administration even started, rumors circulated that Sununu did not want Bob Teeter as deputy chief of staff. Teeter, who, unlike Sununu, had long-standing ties to Bush, could potentially have served as a counterbalance to Sununu. But Sununu, the story went, objected to Teeter having direct Oval Office access to Bush and vetoed Teeter's appointment. Without a check in the form of Teeter, Sununu managed the White House in his abrasive way, with serious consequences for the Bush White House.

When Bush eventually recognized that Sununu was unviable, he attempted to have Transportation Secretary Sam Skinner—who often clashed with Sununu—replace the cantankerous chief of staff. No one, including Bush, wanted to do the actual firing, and Bush had to enlist his son—future president George W. Bush—to talk to Sununu. Even then, according to some accounts, Sununu still would not leave and had to be told even more starkly that the time had come.

In Bill Clinton's administration, the first chief of staff was Clinton's childhood friend Thomas 'Mack' McLarty. A successful business executive, he was universally liked by those who knew him, but many Washington observers saw McLarty as not chief of staff material. Time called him 'Mack the Nice' and asked, 'Is Thomas McLarty, Bill Clinton's kindergarten classmate, just too nice a guy to be White House Chief of Staff?'

McLarty had wanted to bring on board Carter domestic policy adviser Stu Eizenstat, another old Washington hand, but Clintonites vetoed Eizenstat for a White House gig because of his previous work for Carter. Not being able to pick his own deputy contributed to McLarty's ineffectiveness. Clinton himself acknowledged in his memoir that McLarty was 'an unusual choice' and 'hardly a Washington insider.' Furthermore, according to Clinton, 'In the first months of our tenure, both he and I would suffer from some of our tone deafness about Washington's political and press culture.'

As a result, the Clinton administration got off to a truly terrible start. Incidents like Hair Force One, in which Clinton allegedly held up traffic at Los Angeles International Airport while getting a $200 haircut, or Travelgate, in which the Clintons appeared vindictive in firing the career officials in the White House travel office—both of which happened in May of 1993—were certainly contributors to the problem. But there was a larger problem as well. The administration just did not seem to function correctly. Domestic policy adviser Bruce Reed described that initial period as 'just chaotic. There wasn't anybody in charge.'

Media consultant Frank Greer had a similar view. As Greer put it, Clinton's 'first White House staff, and the way they constantly went around Mack McLarty—it was destructive.' As a result, 'everybody was freelancing, everybody was promoting themselves, everybody was looking out for themselves.' Myers recalled that things were so bad that 'There was a piece in I believe the

New York Times that basically said this would be a failed presidency. You know, ten days into Bill Clinton's first term.'

When George W. Bush became president, he already had been a close observer of his father's White House. As David Frum has noted, Bush's work with his father in the 1988 campaign and during that administration meant that he was 'the only president with functional experience of being a White House staffer.' That experience had a powerful effect on Bush 43, as the Bush 41 White House had significant management challenges. So, when it came time to create his own White House, George W. intentionally selected a chief of staff with White House experience—Andy Card—who would not run roughshod and would consciously contrast himself with Sununu.

Unlike Sununu, Card was much more soft-spoken, collaborative, and plainly averse to foul language. He was also wary of alternative power centers in the White House, something that he had seen in Bush's father's White House. Deputy chief of staff Josh Bolten had also worked in the Bush 41 White House and had similar concerns. The two men worked together to make sure that there was a coherent and consistent process governing policy development and decisions. Process was everything, and woe betides the staffer who would commit the dreaded 'process foul.'

Barack Obama went back to the profane approach with the famously foul-mouthed Rahm Emanuel as his chief of staff. Emanuel faced problems in the form of Valerie Jarrett, close friend and senior adviser to Obama. Emanuel was rightly wary of her. She had a tendency to circumvent the process by bringing issues directly to Obama, outside the traditional staff process. There was also the problem of her unwavering enthusiasm for Obama's ideas. As one senior aide noted, 'It's tough to have her around when you're trying to tell the president, 'Well, no, I think this is wrong.' Because she's always there saying, 'Oh, *yes*, it's fine.'

Emanuel could not compete with Jarrett. Even though he also knew Obama from Chicago, Jarrett's relationship was longer and deeper. Emanuel could have all the tantrums he wanted, but Jarrett was closer to the president. Emanuel left in October of 2010. As the *Weekly Standard's* Matthew Continetti joked, Emanuel's struggles with Jarrett 'led to Emanuel's sudden discovery that he had always wanted to be mayor of Chicago.'

To replace Emanuel, Obama selected another Chicagoan, William Daley, from the famous Chicago political dynasty. Daley was a surprise choice, both to the staff and to himself. The White House staff saw him as a conservative outsider. National Security aide Ben Rhodes's description of Daley is telling. According to Rhodes, Daley was 'a bald, Chicago-accented centrist who'd recently been hired as chief of staff to make deals with Republicans.'

For his part, Daley had issues with the White House staff as well. According to the journalist Chuck Todd, Daley 'had never met a group of people more disdainful of Congress than the White House staff he worked with.' Daley also felt like an outsider among them, noting that 'even though I knew Valerie and a few others, I wasn't that close with any of the people.' What made things worse was that the team he inherited was not his own, and he had little ability to make changes to the staff. As Daley complained, 'the entire team was people who had been together from the very beginning, no doubt about it. That made it difficult, and all the slots were all filled. There was no full-scale sort of change beyond *We'll change the guy at the top—chief of staff role—and see if that makes a big difference.*'

Although Daley faced difficulties with the staff, his biggest challenge was with Jarrett. The problems included minor inconveniences, like having to share a speechwriter with her, as well as more significant ones on policy. As an anonymous White House adviser told the *New York Times* about Daley's predicament, 'Valerie is effectively the chief of staff, and he knows, but he doesn't know.' Overall, Daley had even worse relations with Jarrett than Emanuel had, and could not even tolerate being in the same room as Jarrett.

After Emanuel and Daley left, Obama took a different approach to his chiefs of staff. Their replacements would have much less confrontational tacks towards the powerful Jarrett, including temporary placeholder Pete Rouse and former budget director Jack Lew. Denis McDonough, Obama's final chief of staff, saw what had happened to his first term predecessors and was much more accommodating of Jarrett. He described Jarrett as an asset rather than a liability to being chief of staff, explaining that, 'VJ makes my job easier, not harder. The fact that she's close to the president and to the first lady. That coupled with the fact that she is a consummate professional.' McDonough clearly saw the risks of antagonizing Jarrett, and instead tried to placate her, a strategy that seemed to work for him.

As for Donald Trump, he tried four different chiefs of staff, but none managed to eradicate infighting. The closest he came to getting things under control was his move to bring in Department of Homeland Security Secretary John Kelly as chief of staff in July of 2017. This move reflected an instinctive, if temporary, interest in a more orderly process, at least until Kelly himself fell out of favor and eventually left at the end of 2018. Trump would have two more chiefs of staff, former Congressmen Mick Mulvaney and Mark Meadows. Neither tried to control the uncontrollable.

As this survey shows, chiefs of staff have a tremendous capacity to bring order to the chaotic White House environment. Yet they must be careful to avoid getting involved in the infighting themselves. If that happens, it can only exacerbate infighting, requiring the presidents themselves to intervene – if they are willing to do so.

Tevi Troy is a Senior Fellow at the Bipartisan Policy Center and a former White House aide. This is an exclusive excerpt from his latest book, Fight House: Rivalries in the White House from Truman to Trump (2020).

Further Reading

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Measuring the Value of a Chief of Staff

By Rob Dickins

Introduction

In business, we often assess opportunities through the lens of Return on Investment (ROI). We consider whether we should invest in something based on the potential financial (and sometimes non-financial) return. I work at Autodesk, a world-leader in design and make technology. We build software that serves professionals in fields such as architecture, engineering, and construction; product design and manufacturing; and media and entertainment. We empower innovators everywhere to solve challenges big and small. Like any business, we must carefully assess the value equation we offer customers: what capabilities can we offer customers in exchange for what price? Our aim is always to make such decisions a 'no brainer'; the more such decisions are obvious and compelling, the longer our customers will remain invested in us and our solutions.

As chief of staff to our CEO, I have a role in ensuring these and other key topics are items on our staff agenda. I have been in a chief of staff role for nearly ten years across multiple leadership teams; at Autodesk I've helped architect a model in which every member of CEO Staff has a chief of staff, and I collaborate with that cohort to drive things operationally across the organisation. Chief of staff roles have also grown inside our company beyond this executive level, as numerous other VPs have made their own value calculations and decided it's worth carving out budget to fund a chief of staff on their respective leadership teams. These two threads – the well-honed muscle around looking at things through the lens of ROI and the increasing prevalence of the chief of staff role – have driven me to reflect on the value of the role itself.

The Value Question and Why It's Important

As the chief of staff role has spread into new domains, the initial and most common question has often been 'what does a chief of staff do?'. In government and military contexts, this question was asked and answered quite some time ago. The question arose with greater prominence in the business context perhaps five to eight years ago, though it's becoming less common now. Why? Because those of us in the role have worked over recent years to shed light on how the role can be designed for different situations, and therefore what the key responsibilities might be for someone in the role. I have attempted to be one of these voices, and I've written several articles focused on the chief of staff role published on LinkedIn and elsewhere. Overall, I see this trend as progress; fewer questions and greater clarity about what someone in a chief of staff role does signals that the role in the business context is maturing, and with maturation comes increasing professionalism.

But with this evolution, a new question begins to arise and take prominence. This question shifts the emphasis from what a chief of staff does to how he or she does it. 'How' gets into skills, tools, and methods; these things collectively add up to what we might call 'performance'. Historically, assessing performance of a chief of staff can be quite subjective. In contrast to other business fields such as sales or marketing, which are highly metrics-oriented, performance in the chief of staff role has been harder to nail down. In my experience talking to those who have a chief of staff, one can typically sense whether a chief of staff is 'working out' or not, but they struggle to express 'why' in clear terms.

Given my desire—and I assume the desire of anyone reading this article—to see continuous advancement and elevation of the chief of staff role, this is a problem. Our struggle to assess performance undermines the development of the profession. Furthermore, the inability to identify specific strengths or weaknesses makes it harder for any chief of staff currently working in such a role to spot development opportunities and pursue professional improvement. However, there is an alternative path: if we build on our track record of explaining what the chief of staff role is and start to pursue performance measurement for those in the role, performance and impact will rise over time and investment in the role will increase in parallel.

So, to pose our challenge as a question: how might we measure the value of a chief of staff?

Scope of Effort

As those reading this article undoubtedly know, the responsibilities of a chief of staff can vary from role to role. Chiefs of staff work in different organisational contexts (government, business, non-profit, etc.), at different levels, and across different domains, resulting in a variety of responsibilities depending on the situation. Given the variety of role definitions, any pursuit of measurement needs to begin with a target scope for the effort.

My experience is based primarily on the chief of staff role in the business context. In a prior article, I have asserted there are three potential orientations for the chief of staff role:

1. **The Principal.** In this orientation, the chief of staff is there to enable the principal (e.g., the person for whom the chief of staff works) to operate at a higher level of performance.
2. **The Leadership Team.** In this second orientation, the chief of staff is there to enable the leadership team to operate at a higher level of performance.
3. **The Organization.** In this third orientation, the chief of staff exists to enable the broader organisation to operate at a higher level of performance. In this context, the chief of staff may operate much like a Chief Operating Officer for the organisation in question.

For the purposes of this article, I will focus on a chief of staff in a business context with a centre of gravity in Orientation #2, towards the leadership team. This orientation has been a significant portion of my experience, so I feel I can comment on it with some conviction. Furthermore, it is the most common orientation I see for other chief of staff roles in business. Although I'll narrow the scope in this way for the purposes of this article, I hope those operating in different contexts or orientations can make straightforward extrapolations to their situations and extract value from the points below.

Measuring Value in Orientation towards the Leadership Team

My approach for assessing value in this context starts with a reflection on the orientation itself. What is a chief of staff there to do in orienting towards the leadership team? Increase the performance level of the leadership team.

'What is a chief of staff there to do in orienting towards the leadership team? Increase the performance level of the leadership team.'

In any leadership team, each member of the leadership team oversees a set of key responsibilities and often an organisation. The goal of the chief of staff in this situation is not to improve the performance of any single leader or his or her functional area; rather, it's to gain maximum value and impact from the time the leadership team spends together.

In the popular media, much is written about how meetings are often a waste of time. To be sure, poorly structured meetings with unclear purposes are, in fact, a waste of time. But these popular headlines miss an incredibly important point—the leadership team's time together is a critical factor in the success of the organisation. Any leader of a significant organisation has immense pressures on their time. When all such leaders come together as a team, it's a rare and important moment for the entire organisation. Used effectively, this time turns into gold for the organisation. Wasted, it spells ruin.

This, I believe, is the foundational performance objective: any measurement of value for a chief of staff who seeks to continuously improve the performance of the leadership team (the essence of orienting towards the leadership team) must centre how well the collective leadership time is used, as this responsibility falls squarely on the shoulders of the chief of staff.

In Pursuit of an Equation

Ideally, measurement efforts can be distilled into an equation. Such representations, however imperfect, pull us away from the subjective and towards the objective. Pursuing an equation that helps to illuminate performance of the chief of staff might start with examining the components that contribute to the foundational performance objective outlined above.

If we consider a set of recurring meetings that a leadership team has scheduled, what are the factors that might dictate how well that scheduled time is used? In my experience, the key factors are the following:

1. **The Topics.** *What* topics are getting onto the leadership agenda and *why*?
2. **The Cadence.** *When* should the team engage on which topics? How might we balance known, important topics with late-breaking, urgent topics?
3. **The Design.** *How* should the team engage on a topic? What data or information is prepared or shared in advance? How is the live discussion designed and facilitated?
4. **The Outcome.** What is the outcome of the discussion? *Who* owns the next step(s), and what is the system of accountability?

In my view, the above four factors contribute greatly to the foundational performance objective. It's worth unpacking these areas a bit more to uncover what high performance might look like. To this end, I think it's helpful to think of these factors in the context of how a chief of staff might prepare for, conduct, and conclude a specific staff interaction.

Topics & Cadence

For years I've been asked this question: 'how do you determine what the staff should spend time on, when the surface area of the team is so expansive?' It's a great question, and an important one. In my role, I consider two input streams:

- Stream A pertains to things that, all other things being equal, merit the time of the leadership team in some periodic cadence.
- Stream B pertains to things that were previously unknown but are now urgent and important.

For Stream A, it's possible to build a finite list of topics that merit ongoing review, given the objectives and context of the leadership team. For an executive team at a large company, this list might include regular inspection of key business priorities and financial performance, organisational design, talent development, culture evolution, and a myriad of other things. The point is, the chief of staff can build such a list and validate it with the leadership team, arriving at a joint agreement; the list can evolve over time as the internal and external environment change.

Stream B is harder to plan for in terms of a finite list of topics because Stream B is, by definition, unknown. However, it is possible to plan for it in terms of capacity, or more specifically, reserve capacity. Said differently, we may not know what urgent and important topics might arise that merit attention (thinking over the past eighteen months, such topics could have included the global pandemic, social inequality issues, or extreme weather events, to name just a few), but we know something will show up and demand time, so we must assume some capacity relative to overall available capacity.

It's worth taking a moment here to talk about the concept of capacity in a bit more detail. 'Capacity', as used above, refers to the amount of scheduled time on the calendar that the staff spends together. Depending on the meeting model, some executive teams may have a blend of weekly tactical meetings and less frequent strategic meetings, as well as other types in between. Capacity is the sum of all those scheduled hours over a given period. There is some minimum level of capacity that any team requires to function effectively; more capacity beyond that level is a choice of the leadership team.

In the context of preparing for a scheduled staff interaction, the chief of staff must critically assess the confluence of Stream A and Stream B and decide what the optimal set of topics are for a specific scheduled interaction. I believe this requires a mix of art and science. The science comes from the tools and methods the chief of staff might use to inform topic-by-topic cadence based on the seasonal flows of the executive team and the needs of the organisation. The art comes from judging when some of those planned topics need to be sacrificed and deferred in the face of new, urgent topics. A high-performing chief of staff will perform the art and science rituals above regardless of capacity; the operational assumption is that the capacity is fixed. We can always add more capacity (i.e., put more meeting time on everyone's calendar), but that is rarely the preferred choice in my experience.

The Design & The Outcome

Topics, cadence, and capacity tee up the next critical element of the chief of staff role – how to approach a given topic discussion with the leadership team. The goal is to maximize the value and impact of spending time on the topic. To illustrate this, let's consider the following hypothetical scenario:

- a leadership team has an existing, recurring interaction coming up in two weeks; and
- the entire meeting is scheduled for six hours, and there is one sixty-minute section that focused on Topic X.

Now, let's consider two possible approaches to this scenario: the first approach is one with low value-add from a chief of staff, the second approach is one with high value-add from the chief of staff.

In the low value-add approach, the chief of staff ensures the subject matter experts for Topic X know their time slot for the meeting and prepare something to present. The experts show up at the meeting, present to the leadership team for forty-five minutes, then ask for input or guidance on a decision. The principal (the most senior person in the room) jumps in and offers her point of view. A few other members of the leadership nod and agree, others are silent. The fifteen minutes allocated for discussion time is exhausted, there is an assumption of a decision, and the meeting ends.

In the high value-add approach, the chief of staff takes personal responsibility for realising the highest quality outcome possible. Given this, there is much more planning that goes into the review of the topic:

- The chief of staff might first pressure test the desired outcome of the session with the subject matter experts.
- The chief of staff might suggest a pre-read or pre-watch be sent to the executive team seventy-two hours before the meeting to minimize one-way presentation time during the scheduled live session.
- The meeting might start with a few minutes of a refresher on the topic at hand, then the chief of staff might open the discussion up for clarifying questions.
- Next, to avoid a range of cognitive biases that might enter such a conversation, the chief of staff might facilitate a number of structured methods to ensure all members of the team are heard and the best ideas and insights are surfaced.
- Finally, the chief of staff might verbally playback the understanding of where the team is landing in clear, unambiguous terms during the close of the meeting and then in written form within twenty-four hours of the meeting to ensure alignment on the outcome.

The higher value-add approach clearly looks and feels very different than the low-value add approach. And I can state with conviction that the high value-add approach delivers higher quality outcomes. Unfortunately, leadership teams without a chief of staff probably experience the low value-add approach all the time. And teams with a lower-performing chief of staff might even experience it occasionally.

Putting the Components Together

Let's recap the ground we've covered:

- we aim to measure the value of the chief of staff;
- we defined the scope as a chief of staff working in the business context in Orientation #2;
- we determined the performance objective (how well the collective leadership time is used);
- and we identified core components that contribute to the stated performance objective:
  - Topics
  - Cadence
  - Design
  - Outcome.

Therefore, a chief of staff who performs increasingly well against each of these components should provide increasing value to the leadership team. Furthermore, any improvement in the sum of these components should equate to an increase in the value of the chief of staff. This is a big part of our measurement objective; it can be helpful for comparing one chief of staff to another, as well as assessing performance improvement for a chief of staff over time. But what does success ultimately look like? Is there a benchmark for high performance?

It’s my view that the critical benchmark is performance against the external comparison which is relevant for a given leadership team. In any increasingly competitive or threatening environment, the advantage often goes to the fastest. Building on this point, the four quality components described above – topics, cadence, design, and outcomes—must come together, blend artfully, and flow at a pace that meets or exceeds the pace for similar motions being carried out by the most relevant external comparison. In business, we can envision the leadership team of our biggest competitor next to ours. If our pace for reviewing, digesting, and making clear decisions on a balanced menu of long-term strategic topics, as well as urgent and important topics, exceeds the pace of the other leadership team attempting to do the same, I would argue the chief of staff is performing at a high level. It doesn’t always mean we will win; not every call we make will be the right one, and execution could falter, but the primary reason the chief of staff is there on the team is being fully realized. To represent this argument as an equation, we might construct it as follows.

$$PI(T + C + D + O) / PE(T + C + D + O)$$

Where:

- P = Pace (of either the internal team or the external team);
- T = Topics;
- C = Cadence;
- D = Design; and
- O= Outcomes

If the pace and sum of our internal quality motions exceeds the pace of the quality motions of the external team, the numerator increases and the overall value increases.

Using the Equation

I believe this equation and the respective components can be helpful for diagnosing performance and identifying personal development opportunities. I have attempted to apply this formula to my own work as a chief of staff over the years. To provide some sense of what this thinking has driven me to do and develop, I can share some of the following details:

Topics & Cadence:

- Some time ago I created an approach that I call the Topic Forecast. The approach is a combination of a tool and a set of processes; together, they support the ‘art and science’ rituals I describe above.
- The tool is a visual reference that contains a living list of topics we believe the leadership team should spend time on at some regular cadence. I can map out when such periodic engagements should happen by month, and then I can link the monthly topics to specified recurring meetings.

- In addition to this plan-view, I also mine for urgent and important topics in my regular staff interactions (as a group or in one-on-ones), as well as in my other interactions across the organisation.
- These motions contribute to a specific, monthly proposal. At the beginning of each month, I send a message to our executive team that is my recommendation for specific topics mapped to scheduled interactions for the upcoming two-month period. Sending this recurring message allows me to get feedback, surface any other late-breaking topics I might be unaware of, and inform my final agenda-setting for any specific meeting. More generally, it allows our team to manage an evolving flow of topics in an efficient and planful way that is also agile and opportunistic.

Design:

- I believe one of the most important skills for a chief of staff is facilitation. In this sense, I'm referring to a broad definition of facilitation, including the upfront design and preparation, as well as the live session management.
- To this end, several years ago I embarked on a journey to develop my facilitation skills. I learned of the field of Human Centred Design (HCD) and the many methods and techniques that have emerged through that discipline.
- As a company, we partnered with one specific firm (the LUMA Institute), and after my first two-day course it became obvious to me how powerful a method-based approach to facilitation could be for my job as a chief of staff. Over time, I trained to become an in-house instructor of these methods, and that work led to opportunities for me to facilitate executive-level briefings, customer workshops, and large-scale (100+ people) interactive sessions.
- To this day, for any complex discussion, I lean on these methods and techniques. In some cases, I use a classic method or series of methods as designed. In other cases, I build off the principles and philosophies behind the methods to tailor them to suit my specific needs.

Outcome:

- In terms of outcomes, my favourite question to ask a leader when we're collaboratively preparing for an upcoming session is 'what is the desired outcome?' I have often found that leaders know when they want to have a discussion with a group of stakeholders about a topic, but they haven't quite thought through how they might articulate the desired outcome in clear terms.
- If we can write down the desired outcome in specific terms (e.g., 'we end the session with a set of objectives, a high-level timeline, and a decision owner for this project moving forward'), then it describes to me what I need to do before the meeting to allow us to achieve that outcome as efficiently as possible.
- For example, the above example might imply we need to send relevant information ahead of the meeting to allow the team to digest the proposal on their own terms. It may also imply the need for a design for the live session itself; we could use HCD methods

that encourage divergent or convergent thinking, or perhaps prompt constructive criticism to pressure test the proposal.

- My ultimate test for how well I've prepared for a given session is writing my post-meeting notes before the meeting. While this may sound strange, it's actually not: if we have clearly articulated the desired outcomes, and I have designed a structured approach that is well suited to those outcomes, and I facilitate the session per the design and don't get derailed, then I should, in fact, have a very good idea of where we will land. Of course, any such notes I write before the meeting are subject to our actual discussions, and I adapt them after the fact as needed. In any case, it's a good test and allows for efficiency in playing back the actual outcomes following the session.

The above examples hopefully shed a little light on what pursuit of higher performance might look like for components of the value equation. I use the word 'pursuit' intentionally, because I think performance improvement is never done, and there is rarely 'one, best way' to do something. I like to keep an open mind and experiment. To quote a sign I found on the wall when touring IBM's Design Thinking headquarters in Austin, Texas: 'Every Day is a Prototype'.

Conclusion

I believe the chief of staff role is engaging and rewarding, and I know those in the role can have an enormous impact on the people, teams, and organisations they are there to support. I love the idea of embracing our value and pressure testing if and how we can do more. I hope the above information advances our collective wisdom and prompts others to debate my points and build upon them.

Rob Dickins is currently Vice President & Chief of Staff to the CEO of Autodesk, a global leader in design and make technology. With nearly ten years of experience in Chief of Staff roles, Rob is passionate about contributing to field and has authored numerous articles about the role published on LinkedIn and Medium. Rob is based in the San Francisco Bay Area.

Further Reading

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Embedding Zero Trust Cybersecurity into Enterprise Operations

By Dr Charlotte M. Farmer

Introduction

Circa 1984–1987, the saying ‘trust, but verify’ became internationally known after Suzanne Massie, an American scholar, taught it to President Ronald Reagan, who used it on several occasions in the context of nuclear disarmament discussions with the Soviet Union. ‘Trust, but verify’, along with derivatives like ‘trust and verify’, eventually shaped many facets of the economy and culture as it was relevant to multiple sectors. Fast forward to 2019, and ‘never trust, always verify’ gains momentum in the context of cybersecurity. Experts in the field sparked a movement centred on the belief that trust is a vulnerability, and security must be designed with a ‘Zero Trust’ strategy. The United States House of Representatives, the National Institute of Standards and Technology, and the National Security Agency recommend that all government agencies adopt Zero Trust in the wake of cyber-attacks including the Solar Winds[1] attack that led to data breaches in thousands of organisations around the globe including multiple US Federal agencies. This article highlights relevant aspects of Zero Trust cybersecurity for chiefs of staff and other leaders in enterprise operations.

The article is a transcript of a conversation convened between members of the CyberEdBoard, a community of global cybersecurity senior leaders. The author is Dr Charlotte M. Farmer (CMF), current Director for the Center of Programs and Technology Operations, MITRE, who previously worked across Federal agencies and Fortune 500 Companies. The author convened a conversation with two thought leaders, trusted advisors, and authors in the field of cybersecurity to get to the crux of the Zero Trust framework and elicit guidance for early adopters: Zachery S. Mitcham (ZSM), the EC Council 2018 CISO of the Year; and John Kindervag (JK), a widely known Zero Trust expert.

CMF: *Before we start the discussion, please provide background and context of Zero Trust. Help readers understand what adoption of Zero Trust looks like in an organisation.*

ZSM: *The goal of any viable and effective information security program is to create a ubiquitous culture of security that is pervasive throughout the organisation. Zero Trust considers multiple aspects of the organisation including (but not limited to) workforce, enterprise, and technology.*

Workforce aspect.

Empirical evidence indicates that an organisation's strongest asset, its workforce, can be the weakest link in its information system. Natural tendencies, proclivities, and implicit biases allow for system vulnerabilities. Securing the human begins with rigorous, adaptive training combined with campaigns that emphasize both personal and enterprise implications of security breaches. False negatives and positives result as causation of these human frailties. Securing the human begins with education about the negative effects of lapses in security. Often, the cyber-attacker focuses on the human as the primary target of their attack. It is therefore imperative that security awareness training is mandated for the workforce throughout the organisation. Senior management, from the organisation's governing authority to the CEO and all throughout the entire chain of command must set the example by providing leadership and being actively engaged with the effort to maintain a culture of security within the enterprise.

Enterprise aspect.

Like Sarbanes-Oxley legislation, cybersecurity legislation will compel corporate boards to have knowledge of what occurs within the organisation's IT operations. Failure to fully implement zero-trust architecture within our technological infrastructure grid resulted in exposure of weaknesses in supervisory control and data acquisition (SCADA) systems; thereby, placing them at risk of being exploited by future cyber-attacks. It would be wise to prepare for legislation on the horizon which holds corporate boards and C-suite executives personally accountable for security breaches.

State-sponsored and criminal cyber-attackers have exposed system and infrastructure vulnerabilities to unauthorized information system intrusions. Recent supervisory control and data acquisition (SCADA) ransomware attacks on critical infrastructure (e.g., supply chain, food distribution system, Solar Winds, Colonial pipeline, JBS Foods) has heightened situational awareness of American citizens. The US government bears responsibility for defending its citizenry, at all levels, against all enemies foreign and domestic despite whatever the type of attack it may be, cyber, military, pandemic, or directed-energy attacks that are making government employees sick throughout the world.

As such, on 12 May 2021, President Biden issued Executive Order 14028 to Improve National Security in Cyberspace. The executive order establishes a timeline to meet these foundational objectives:

- Mitigation and prevention of advanced cyberattacks through the adoption of cloud technologies, strengthening asset management methods, and mapping policy enforcement with zero-trust architecture.
- Increase information sharing between agencies and transparency into cyber incidents by standardising reporting and communication methods at all federal agencies.
- Create standards for logging techniques, communicating incidents, and remediation techniques between information/operational technology providers and the federal government.
- Items featured in the executive order expound on the Office of Management and Budget Memorandum M-19-17 relative to enabling the delivery of the mission conveyance via refined credentialing, access control management and identity validation.

In 2020, Okta surveyed companies to learn how organisations around the world think about Zero Trust. North America leads with 60% of respondents embarking on Zero Trust initiatives. Australia and New Zealand are not far behind, with 50% saying they have Zero Trust projects underway, whereas Europe and the Middle East are lagging, with under 18% on board.

Currently no government in the Asia Pacific region has adopted Zero Trust as its cybersecurity agency's framework. There is no current mandate to use a zero-trust architecture for European Union countries. The U.K.'s National Cyber Security Centre published Zero Trust Architecture Design Principles 1.0 on 23 July 2021, however, no mandate to use Zero Trust appears to be in place. Australia and the United Kingdom have started the process of introducing Zero Trust Architecture guidance. Australia's Essential Eight maps to elements of the Zero Trust framework. The Essential Eight are recommendations to secure federal entities and improve cybersecurity protections. In July 2021, the Attorney General's Department announced plans to extend the protective security policy framework (PSPF) to require implementation and audit of all eight areas.

Technology Aspects

Intellectual property, personal identifying information, and other forms of sensitive data are electronically pilfered non-stop. Anything with an internet protocol (IP) address can be hacked (e.g., individuals, enterprises, businesses, organisations, nations) no one, nothing is safe. Zero Trust Architecture helps mitigate the risk of system and data compromise when implemented correctly. Implementation considerations include, but are not limited to the following:

- **NIST 800-207 Compliance.** The national standard that governs the Zero Trust Architecture. The primary focus of this architecture is the protection of information system resources such as network accounts, services, and assets.
- **Continuous Diagnostic and Mitigation Program.** Continuous monitoring of all devices, applications and services that run on the devices is essential to the understanding of

activities that are occurring within the network.

- **Primary Zero Trust tenets and framework.** Access control of the user, endpoint and application is the primary focus of zero-trust architecture. Authentication and authorization of users, endpoint, application, and continuous/dynamic monitoring thereof are of paramount importance to safeguarding the integrity of the data being protected.

- **Securing Data, Cloud/Application, and Services.** Zero Trust Architecture assists with securing cloud services by diverting primary focus away from the organisation's perimeter and shifting focus to outsourced collaborative computing services (i.e., the cloud). The enterprise can, therefore, provide security to data and systems irrespective of where it resides and trusts no user, device, or application until it has been fully vetted via authentication and authorization methods. To be effective, Zero Trust Architecture must be embedded pervasively throughout the enterprise's technological security systems.

- **Securing Endpoints/Devices.** Security software must be installed on user devices (e.g., desktop, laptop, tablet, smart phone, etc.) that provides continuous defence against unauthorized use (both on-line and off-line). Due to increased demand for employees to work remotely, several organisations utilize virtual private networks (VPN) to extend the security of the office to remote locations. Given the recent surge in cyberattacks, more and more organisations are moving away from VPN technology to software defined wide area network (SD-WAN) technology. While both VPN and SD-WAN offer high levels of security, SD-WAN provides greater resilience to single points of system failure. Users of VPN are vulnerable to end-point exposure which may vary widely. The SD-WAN is more fault tolerant than the VPN in that it has failover capabilities that the VPN does not. For example, during a network outage, the SD-WAN transfers users' internet protocol (IP) addresses to viable connections to ensure business continuity. The SD-WAN does not require user interaction to secure their connection. This is a plus when it comes down to Zero Trust Architecture because all points of engagement require vetting. SD-WAN provides security through extension of automated (off-premises) cloud-based services enabling organisations to reduce overhead costs associated with ubiquitous network security. Corporate Boards should ask Chief Information Security Officers for the best possible approach that fits their organisation's business needs.

- **Securing Network Accounts.** Devices no longer work as standalone or in isolation which is the only way that you assure that they are secure. Even then it is no 100% guarantee due to the human element involved. Devices of all kinds are distributed and interconnected locally and over long distances. In the beginning networked computers were designed to be open and collaborative. All that changed in 1988 with the introduction of the Morris Worm. The Morris Worm introduced the idea that computers could be unfavourably affected by an unauthorized user. Trust became a thing of the past and security became the new paradigm. Fast forward to Zero-trust architecture, 'Trust no one and nothing,' when it comes to network accounts. This means every user, device and application from the local area network or in the cloud had to earn trust and be given the least privileges necessary to conduct their tasks. Prior to Zero Trust variants could easily bypass security at the edge of the perimeter if given free access.

> Zero trust requires organisations to assume that all devices, users and applications have been compromised potentially.

Five Steps of the Zero Trust Program

CMF: *Thank you for establishing background and context Mr. Mitcham. Mr. Kindervag, what is the crux of the Zero Trust program, the crux of the construct that makes it go?*

JK: Well, the crux is to figure out that you can't protect anything until you understand what you can protect. That's called a protect surface. I'm on these calls all the time, where everybody is positioning their product. I'll finally at some point say, 'What are we trying to protect?' and then they go, 'Oh, I haven't thought about that.' If I know what to protect, then I can know how to build it. And so, I built a simple **five step methodology**. I use it every day.

'The crux is to figure out that you can't protect anything until you understand what you can protect.' *- John Kindervag*

The **first step** is to find the protect surface, what are you going to protect— that's called a data element. 'DAAS' is easy to remember, the acronym that stands for data, applications, assets or services. Next, you'll see this represented in the DISA guidance. You take a single data element, you put it into a single protect surface, and then you architect everything around it. We've defined the protect surface as a high value asset, say, the OPM data that was stolen.

Okay, now the **second step** is to understand the transaction flows. How does the system work together? We can't protect the system until we understand how it works.

The **third thing** we do is we architect the controls for the protect surface. Too often we start with the architecture before we know what needs protection. Every zero-trust environment needs to be tailor made for the protect surface, so I can't tell you what controls you need, until I know what I'm protecting.

The **fourth step** is writing policy. That's called the Kipling method. And I can use that 'who, what, when, where, why, and how' methodology to define a protect surface.

Who should be accessing a resource, this is a layer seven instantiation of say, source IP. And this is where we do all the identity stuff, what, by what application? Should I be allowed to access the resource, because in almost all cases, resources, or app access for your applications, so I can define that all the way up at layer seven instead of just at port and protocol. The third step is who, what, when we need more time delineated rules? We don't do that very often. But a lot of rules should be turned off if nobody's using them, you know, consistently.

Where is that located? This again, is you know, because we have certain rules that say, you can go to the cloud, but only in this geographic area, we need to understand that.

Why is data for classification, reading the metadata from the classification? I have written about how we can reinvent that. But, if we do that, we can then bring in that metadata to help inform policy.

And then the how statement is all the separate criteria that we do. You typically run a packet through, you know, a whole bunch of different technologies, you know, IPS and content filtering and sandboxing. What you try to do, the reason I like next generation firewalls, is they collapse all that technology. And you can apply that in a single rule. I have one customer in the US military, they have twenty-two hops to get outbound on the internet, it's over 100 milliseconds of delay. And, you know, I mean, that's just unheard of in the corporate world. But in the military world, everybody's so concerned that they're just putting more stuff in place. And, that's not helping, because you end up kind of decrementing the policy just to get the packet moving.

And you want to be very targeted in how you apply that policy, so that Kipling method policy really helps people understand how to write policy, they can read it, and then they can audit it, and they can constantly update it.

And then the **fifth step** is to monitor and maintain. Take all the telemetry that we're getting from our controls, analyse it, automate actions against bad things, and then take the learnings we haven't filtered through those other four steps, so that we can make the system resilient. Taleb in his book, *Anti-Fragile*, gave me the vocabulary to talk about what I've been trying to build, which is a system that with more data gets stronger and stronger over time. Zero Trust is an anti-fragile system.

And those five simple steps are what you apply to any protect surface. Once you understand that, then it becomes an algebraic equation, the variable, x is the protect surface, solve for x. And, once you get that, then it's a very simple way to do it, you know, and we're not just doing it, reinventing the wheel every single time that we start a new project

ZSM: More and more corporate leaders are being held accountable for the impact associated with cyber-attacks. How can a company successfully implement Zero Trust? And the implementation from all layers, horizontal and vertical? You talked about the five pieces that are necessary to be successful. How would a company that is used to being open like academia be successful in implementing the zero-trust construct?

JK: A lot of people are just used to having access to resources, but they don't need to have access to all sources. So, you say, well, do you really need to have access to that? If it's a published paper that's publicly available, fine, but if it's intellectual property, or very sensitive research, then you must be very judicious on how you allow that access. And so, somebody must make those hard decisions about whether they're going to allow that, and part of that is cultural change.

One of the reasons I talk about the grand strategy is that I can get cultural changes done from the top down. The chiefs of staff, boards, leadership, what they do is they change the incentive structure and say, it's okay to do this. If you think about the military, versus academia, the military way, you're told you don't need to know this, just go do it. You don't question that. And that's because the incentives are there. I see this in hospitals all the time, where people have access to data that they shouldn't have access to. People have been fired, because there was some high-profile case and they wanted to find out what the medical records were in a clear violation of HHS, and HIPAA.

The question is, do you need to have access to get your job done? And if you can't answer that, if it's just because you're curious, or you feel so self-important that you want to get access to everything, then there's a problem. And yes, you can hit anything I say, you can reference it; it's all public. I'm trying to get this out there. I'm trying to change the world just a little bit at a time every single day. What the President did, with the executive order that came out on modernising cybersecurity, and part three was about zero trust, he has changed the incentive in the U.S. federal government.

Everyone Must be Responsible for Zero Trust

ZSM: How do we get that force-multiplier perspective since everybody can't be a Chief Information Security Officer? Everybody can do something in a way that permeates the whole organisation. Using a military metaphor, every General, every private knows how to shoot a weapon, right? One might be an expert, the other might not. But, at the very least, you have a minimum amount of information that you must retain, as a soldier, sailor, airman, or marine to be successful in any military operation.

In cultural change from the Chief Information Officer (CIO) down to the person in the action, he should have some idea of you know what, this guy doesn't have a need to know the person at the help desk, why they asked him in his question, to be conscious of what's always going on around you.

JK: You want to have people shadowing each other? We should avoid leaving a job before our time is up. My dad was in the military and after a certain amount of time he knew that he was getting transferred. And that's okay, if you're transferring from one military intelligence post to another, but in certain things when you're working inside of the cybersecurity realm it is different. It takes years to build up that level of experience. What you want to do is bring those people in, give them challenging positions, rather than transferring them out as soon as they get good.

A colonel in the Air Force said to me, 'look, in the enterprise, you have people with eighteen years of experience doing a particular job, and, I have an eighteen-year-old, who I have to teach to do the same job. So that you know, that's a completely different thing. And then in certain parts of the government, once you get good at something, they transfer you out of it, this is the problem I've had in continuity, in working with the military and other people, I'll spend a year, two years working with somebody getting them to really understand it, and then they get transferred into a different command a different position. And they had a question so that they're still in place doing that, you know, they have a higher role, but they're doing the same place, but they haven't got transferred out into something completely different. And, some sort of specialization would be helpful inside the US government instead of transferring people around based upon their seniority levels, whatever that's called.

'I'll spend a year, two years working with somebody getting them to really understand it, and then they get transferred into a different command a different position.'

Encourage them to stay because there's not enough good people so that they can spend their career hyper focus on this thing that requires hyper focus. Change some of the paradigms on how the government deals with personnel. One of the top people that I'd worked with for three years decided to transfer to a different command, completely unrelated to cyber because there was no way to get promoted. We need to promote within the same Cyber Command because we need those really highly talented people to be focused on sharpening their skills and growing into leaders. You need good people who are cyber people who have gone from being a programmer to being a general officer who is functionally a Combat Systems Officer in the military.

It's like Special Forces in a way, I have a lot of friends who are special forces. And as I understand it, and it could be mythology, but from talking to them, once you're in Special Forces, they don't just randomly transfer you out into the quartermaster Corps. Right? Once you're a Navy Seal, you're a Navy Seal; and, your Military Locator System (MLS) might change a little bit. But in general, you're going to always be there for the rest of your career and retire in that role. And we could do that for cyber warriors because we are all fighting the same cyber war.

The unique thing about it is that the military and the private enterprise are fighting the same cyber war because we're all living in the same bad neighbourhood. We're all directly connected to the world's worst malicious actors because there are no suburbs on the internet. And so, how cyber war differs from kinetic war is that in kinetic war, you must be proximate to an adversary to attack them. But proximity is not a requirement in cyber war, because they're always proximate to us. They're directly connected to us through the internet and have the tools and techniques they need to launch an attack. If you ask the question, 'will I be attacked today by any particular adversarial group?' The answer is invariably, 'yes'.

ZSM: That's right, they think that they can leverage the resources from them to do some like crypto mining.

JK: That's what they would do in the modern world. It's understanding that this adversarial relationship we have is so much different. Now, we're all warriors. We didn't get drafted. We didn't enlist, we just became warriors. And that's the thing you can grab a hold of, to know that you're making a difference. If you find a misconfiguration in your company's policy and fix it, you just made a big difference in that company. Just in doing that simple thing, just by being diligent.

So, the big message to leadership is change the incentives so that it's okay to do the right thing. I was talking to somebody who was at Target during their breach. And there were people who just said, 'let's unplug, let's shut it down' and, leadership wouldn't.

I know the guy on 9/11, who was the head dispatcher for American Airlines; and when the first plane went into the tower, he said, 'We're shutting it down. Every plane that hasn't taken off is shut down. Every plane that's in the air that American Airlines has been diverted.' He got an award from the president for doing that gutsy move. There was a lot of talk that there might well have been other planes that didn't get to take off that had bad people on them, that might have done bad things. And we'll probably never know the real outcome of that.

Sometimes it's okay to pull the plug, until you figure out what's going on and then plug it back in. So, we must enable people to not just worry about availability, but confidentiality is just as important in the modern world.

Conclusion

The advancement of networking in cyberspace since the late 1990s saw the exuberance of disparate industries jumping to the opportunity to examine how they could benefit and take advantage of its enormous business-to-business potential. As a result, we saw organisations rush to conduct business online without fully thinking through the consequences of doing so.

The current situation signals leaders to re-evaluate security parameters for critical infrastructure systems and clearly designate which systems should or should not operate online. Some in the information technology industry may feel that the 'genie is out of the bottle' and it is too late to take critical systems offline. Others may assert that it is a matter of National Security and must be seriously considered. Perhaps, there are solutions that balance both perspectives. For example, security parameters could be adjusted to the level of infrastructure impact. Supervisory control and data acquisition (SCADA) designed infrastructure and similar systems could operate as standalone systems offline. Prior to online, networked, distributed computing there were no opportunities for our foreign adversaries to attack our infrastructure from remote locations. They were offline. Perhaps, it's time to go 'back to the future.'

Implementing Zero Trust security helps organisations safeguard the confidentiality, integrity, and availability of the data that is processed, stored, and transmitted over their technological systems.

Zero Trust is not just a system solution; it embodies a cultural philosophy which thrives when everyone in the organisation 'owns' cybersecurity. Zero Trust is most successful when implemented top-down and embraced at each level of the organisation. Invest in professional and career development of cybersecurity subject matter experts to become strong cybersecurity leaders.

Dr Charlotte Farmer, director, operations and integration, MITRE, combines strategy with technology to solve problems for a safer world. Serving as an award-winning leader within tech companies as well as a board member for multiple non-governmental boards for the past three decades, she drives transformational processes that create both growth and cost-saving opportunities.

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Operating in a world of 'haves' and 'have-nots': the Balancing Act

By Karen Keung

As digitalisation becomes an increasing imperative for most organisations, it is important for any organisation to keep up with the rest of the world. We wanted to improve our onboarding and deployment experience: to make it easier for employees to access information, understand the organisation better; reduce physical paperwork because so many of our employees are located remotely. A mobile application would be useful and light—making it easier to keep in touch, improving that push and pull of knowledge and information management. But then we quickly realised, in most of the contexts we work, our people don't even have internet access, let alone a device that is compatible.

I am the Chief of Staff to the HR Director of an international humanitarian organisation, and these considerations, what to invest in, when is the best time to do so, how does it improve our ability to manage human capital, and how to do more with less and do so equitably, when the environment around you changes on an almost daily basis; are some of the many concerns we face. What do you do when you genuinely want to improve the working life and experience of your employees, but there are some fundamental environmental factors you cannot change?

In the many scenarios, dilemmas and decision-making conundrums faced by those who work in the humanitarian sector, I reflect how contrariness (or 'yes but') appears. Sometimes as a point of frustration from the increasing complexity of our work environment, or a guiding factor that helps to refine our directions and actions. Contrariness reminds us that there is no one-size-fits-all; that a solution for one group of people will not suit another and that every decision must take into account multidimensional pros and cons. The trick then, is to find the combination that delivers the most balanced outcome.

'Contrariness reminds us that there is no one-size-fits-all; that a solution for one group of people will not suit another.'

The goal of humanitarian work is to provide aid to those in need, and the right balance of contrariness is essential to decide whether the aid is appropriate, right or administered to the best value outcome? Who should receive this aid? These are some of the many factors (notwithstanding those relating to actual aid delivery) that form part of the responsibilities of those working in the humanitarian setting. Of course, there are multidimensional considerations that require careful deliberation. To add to the complexity, humanitarian work is typically reactive and time sensitive. We respond to urgencies and emergencies. Long decision-making processes or delays in response can cause greater or different sets of complications.

Working with both the 'haves' and the 'have-nots'

Humanitarian organisations don't live in the gap between the 'haves' and the 'have-nots'— they literally exist on both sides at the same time and operate in an uncomfortable to-and-fro balancing act.

Humanitarian organisations, and many non-profit organisations, face contrariness on all fronts. To enable an organisation to deliver to its mandate, solid infrastructure is needed: employee support mechanisms; training and people development; technology, processes and reporting; clear and transparent documentation of our spend and activity; the ability to measure performance and demonstrate results and outcomes. We need capital investment and continuous improvement to simply exist as an entity. For humanitarian organisations, where every cent counts, and those in need could always do with more support, the additional consideration is: what is the right balance between investing into the future, ensuring efficiency and frugality by moral obligation?

The world is evolving and changing with a rapidity that is hard to follow but certainly exciting. Advancements in science and technology mean we can do so much more. We can be on the ground faster, respond and communicate with greater accuracy and speed. And yet, herein lies our dilemma – the world evolves, but not the whole world; change is happening all around, but it is definitely not equally distributed. Our economic and technological advancements increase our connectivity but in a direction that widens rather than reduces the divide between the 'haves' and the 'have-nots'.

'Our economic and technological advancements increase our connectivity but in a direction that widens rather than reduces the divide between the 'haves' and the 'have-nots'.'

Even more problematic, connectivity makes both sides aware of the gap, and does not necessarily provide the means to address it. The World Economic Forum's recent reports indicate 59% of the world's population is connected to the internet ('87% in developed countries; 47% in developing countries; 19% in least developed countries'). Importantly, this is not a developed vs developing country or culture issue, but a wider one concerning the 'haves and have-nots' which is present everywhere. 'Many rural and low-income communities around the world lack reliable, affordable [internet] access'… where 97% of Americans in metropolitan areas have access to a high-speed fixed service, this quickly drops to 65% in rural areas and 60% in tribal lands (Roese 2021). This scenario resonates with the daily working experience of those in the humanitarian sector in a number of different ways.

Many humanitarian agencies are conceived and headquartered in the 'haves' environment. They benefit from a certain level of socio-economic and political stability, infrastructure, and access to information, technology and scientific advancements. Operating in the 'haves' environments means keeping abreast of constant change and updates, from the latest messaging mediums to changes in data protection and data privacy regulations. This applies to both people and enterprises. Keeping up with technology is expensive but also necessary because the price of not following the crowd is to become increasingly out of touch with your society. On the other hand, we operate and deliver our work in 'have-not' contexts that can neither support the use nor maintenance of more advanced technology.

Uneven access

Say we want to create a more equitable tool in-house that would allow us to accommodate more of our employees given the various environmental factors blocking technology uptake - but in-house means we need the reciprocating internal resources to maintain and manage on premise, which comes at a cost. Our data privacy needs, the necessity to remain independent, neutral and impartial means we cannot work with just any external provider. Even if we do have the infrastructure, taking the time to create something that fits a wider audience, might mean we marginalize a different set of employees. Investing in progressing technology is necessary, and given the scale of our operations, a more comprehensive technology transformation focusing on single systems would be more economically viable, and investing in the latest tech offers future proofing and the opportunity to unify data and information, but the most advanced options are also not compatible with many of our operating contexts. Running dual or even multiple systems on the other hand, is extremely expensive and trying to cobble old and new systems together is not just inefficient, but perpetuates manual work and data errors: which negates why we embarked on a systems journey in the first place. As an institution that lives in both worlds, we can only continue this balancing act of the smallest number of multiple solutions with the largest needs coverage possible, acknowledging that even so, the solution is not going to work for everyone.

As an employer and for employees, the challenges are equally intricate. The workplace is where people demonstrate their competencies and practice what they have learnt. If the current working context cannot provide the opportunity to demonstrate skills in line with the external market, then a strong independent learning agenda is important to ensure employees are not limited in their career prospects. Now, this is an important development.

Human Capital, that intangible asset we know as people and all the qualities that make up a person, skills, knowledge, capability, and experience (and personality), is a critical aspect of an organisation, it represents the individual and the collective. Human capital management trends in ‘haves-environments’ are spearheading conversations about re-architecting work and worker/employer relationships, testing the social enterprise (we are a team, not a family), and unleashing purpose. They talk of transformation and shifting from lifelong employment to lifelong employability. A portion of our workforce will come from environments where they are confronted with continuous automation and robotization in their daily lives, and are aware that to remain relevant, they need to become more and more specialized and ‘specialist’. To keep remain competitive and aware in an ever increasingly ‘connected’ world, they need to be connected, follow the latest developments and advancements in their professional streams.

Our work, however, takes place in the world’s most difficult contexts. Our employees are stationed around the globe in politically tense and high-risk environments, potentially where international sanctions have been imposed, where there is disrupted power supply and a lack of clean water. For them, arguably, connectivity is a secondary consideration. The local context may also mean working with minimum, old and/or outdated infrastructure. For some of these tools, external training is no longer available, meaning we may have to invest in maintaining training and a skill set that is declining or has no value in the open commercial market. This can be a point of frustration for employees as well, if we imagine that the workplace is where they want to demonstrate their application of learning in context (skills versus experience).

Within our own working context, we have a further issue of haves and have-nots. A portion of our workforce are focussed on maintaining basic livelihood as a direct consequence of the context in which they live. For them, the approach to fairness, equal access to learning opportunities, assessment of performance, reward and recognition and promoting employee engagement is different. Initiatives for unleashing purpose is probably not a primary concern, and may in fact be incredibly disconnected from their realities. The fact that this gap, this ‘have and have-not’ situation, exists internally is a basic trait of the sector itself, and is a hurdle for all humanitarian organisations.

Social expectations

Society has a notion of what it means to be a humanitarian. Society expects public duty, voluntary acts of kindness and compassion, absolute transparency, the appropriate use and distribution of funding, the moral obligation that reflects always doing the right thing. Often, we are seen iconically as the gap-closers because of the work we do with the communities we serve. Employees also have expectations of humanitarian organisations that are quite similar—luckily for that element of coherence. They expect care, support and investment into them as valuable and critical participants and partners. They expect fair and right compensation for their work and support and infrastructure to enable them to perform. However, if we bear in mind the extreme deviations between employees’ local and working environments, as well as the variety of sovereign contexts, then what is right or needed for one group of employees is likely to be vastly different to another. We add to this situation, the fact that in and of itself, the work we do and the contexts in which we work means that our human capital is unique to the experience and skills developed in situ. These competencies can be hard to come by elsewhere, and may not necessarily be well understood in the open market. This makes our knowledge management, retention of high performers and critical competencies important, but also means we have to take some different approaches to career development meaning we may not be able to leverage more commercial and standard market offerings.

This is not an uncommon situation for any organisation with a global reach, just that humanitarian work has its particularities, unique stressors and complexities that render certain leading practice approaches to wellbeing and engagement less compatible. For-Profit organisations can leverage external motivators like shareholders and balance sheets and a variety of financial mechanisms for reward and recognition in ways that humanitarians cannot. Of course, humanitarian organisations have their own unique advantages. They can leverage that sense of civic duty, intrinsic values and principles like social duty, contribution and humanity through its corporate culture in a way most commercial enterprises cannot, but it is unwise to count solely on intrinsic motivators. What this means is that humanitarian organisations cannot benefit from scale, nor leverage leading practice and trends to the extent that other organisations can. The caveat here is not to completely reject leading practice. Leading practice exists and represents a portion of the internal population, as well as a significant portion of the public world—and we rely on this public world, which has many faces: the people we serve, the partners we work with, the donors that support us.

The world does continue to evolve, just not all at the same pace. So, as an institution, our growth and advancement needs good strong reflection and consideration to our environment, what is current, the trends upcoming and our employees and their particular environmental contexts and obstacles. We need to maintain ambitions in improving operations but with some humility. There is a sense of necessary frugality when you are in a humanitarian organisation and especially for those areas of an organisation that are not considered front-line. Non-frontline functions exist to support those on the front-lines who ensure aid goes to where it is needed most and makes the best impact, they also exist to ensure the enterprise operates in accordance with the sovereign legislations to which it is bound , for example, every country has its own set of local laws pertaining to employment benefits, which on a global level, then brings another aspect of 'haves' and 'have-nots'. We can only continue the balancing act of having one foot on each side, and choose solutions that allow us to reduce the gap as much as possible, acknowledging once more that no single solution gets us to 100%.

Humanitarian organisations don't live in the gap between the 'haves' and they 'have-nots'—they literally exist on both sides at the same time and operate in an uncomfortable to-and-fro balancing act. For those whose role is to enable the organisation, the aim is then to reduce the gap between the 'haves' and the 'have-nots' with the smallest amount of investment to cover the largest amount of need. It may also seem counterintuitive, but to a degree, this does not mean identifying the biggest area of gap and trying to resolve it, but rather identifying the largest collection of similarities. So, in trying to reduce the gap, we may not try to target the largest pain point, but the most frequent, even if they appear of less importance. For example, we work in countries that are sanctioned by the international community, which places an embargo on certain goods and services. Limits to access, software, or commercial training courses for skills development impact the employees in those countries. This might be a small item compared to creating a new onboarding application on a new digital platform, but may resolve a more frequent concern and cost less to do so.

Even simple choices require the time and investment of change management, and the more complex the decision, the more knowledge, information and open dialogue is needed to maintain motivation and engagement. Nowadays, organisations need incredible amounts of transparency and openness to its investors (donors), its governance, and to its employees. Choosing one project, however, means not choosing another. Where information is free flowing, more communication is needed in order to reduce disinformation. This adds its own set of costs. So, whilst we focus on continuously doing more with less, and improving the work environment to enable employees to do more, faster, we also have the dilemma of needing simply to do less because to do things well, simply costs more.

Communicating clearly

Communicating, or clarifying the whys of decision-making is increasingly important as an objective for any organisation, but for humanitarians, this represents closing the gap between those who can and those who cannot access information. Again, we go back to the world evolving but not at the same pace, and information is widely accessible and free flowing but not in all contexts and not for everyone. Employees are not oblivious to organisational dynamics, and it is easy for all to see the push and pull of being and working in have and have-not environments. The precision of communication and provision of information is also an important concern. Within the dichotomy of the have and have-nots, there are all the variations in between. Perhaps access to information is generally no longer a problem so much as reliability (of access), consistency (of access), and quality, accuracy or diversity of information. We cannot stop information, but what we can do is provide clarity, direction and guidance.

Schwartz' book The Paradox of Choice tells us that the very nature of having too much choice causes less happiness and satisfaction. Choice or the perception of choice comes when you have access to information. When you have access, you are more aware of the complexities and the nuances (the 'haves'). When you have information, you may also be aware of your lack of choice within certain situations (the 'have-nots' realising they have-not). It is for this reason that I challenge solutions with a reductionist view that focus on making things simple as a change strategy. Not everyone will agree with this, but I don't think people want simplicity as much as they want clarity. Taking a reductionist approach and simplifying things does not help us to appropriately identify the diverse perspectives and risks marginalising subsets of stakeholders in the change journey. Giving clarity to complexity is an opportunity to take a balanced approach, but is also a mechanism where we guide employees through complex situations.

Providing information and access to information with the aim of increasing clarity is different to providing excuses or justifications. Theories of motivation tells us that autonomy, freedom of opinions, relatedness and the access to information is important for motivation, and therefore engagement, and engagement is important to employers and employees alike. Embarking on an open process to bring complex issues to light means also opening the door for dialogue and in term, providing clarity rather than simplifying gives the dialogue authenticity (trust and motivations) and reduces the perception risk of being concealing or withholding. Clarifying information can help empower individuals to build their own story and their own rationales to connect with change, but also potentially reduces the sentiments of 'irreconcilable differences' between 'haves' and 'have-nots'.

> ***'Existing simultaneously in 'have' and 'have-not' contexts where 'have' and 'have-not' populations work side by side, united by a common purpose, but equally aware of the gap between the having and not-having, is certainly an interesting challenge.***

The needs of our employees will range from state-of-the-art equipment and latest software, to basic sustenance needs like access to clean drinking water. Existing simultaneously in 'have' and 'have-not' contexts where 'have' and 'have-not' populations work side by side, united by a common purpose, but equally aware of the gap between the having and not-having, is certainly an interesting challenge.

Conclusion

To a degree, all organisations face challenges in the fast-changing world of today. The challenges of a large humanitarian organisation needing to continually adapt, and morph is no different. What is unique for the humanitarian sector is the setting in which they work. The reason for their existence is to reduce the gap between those that have and those that have-not. To be effective in doing that and, to better address the extremely diverse needs of the communities they serve, we need to be reflective of the diverse societies we work with, and so we ironically perpetuate a certain amount of have and have-not within our own structure, by necessity. Resolving this in the immediate future is a hard call, but by raising the awareness and improving our understanding of this and all various dynamics it brings, will help us to continue to make that gap smaller.

Karen Keung is HR Chief of Staff, International Committee of the Red Cross. Originating from Hong Kong, Karen somehow found herself, of all the unlikely outcomes in Geneva Switzerland. She is an organisational psychologist and staunch supporter of health and wellbeing in the workplace.

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Why Every Start-up CEO Needs a Chief of Staff

By Dave Bailey

The majority of investors I know have their own personal assistant to help manage their busy schedule and take care of their admin. Until recently, it wasn't even a question for a start-up CEO to have an assistant.

The trend towards start-ups hiring a chief of staff seemed to come out of nowhere. And can't smart productivity tools, such as AI assistants, achieve the same thing?

Way beyond admin

While the chief of staff role varies greatly between companies, I'm referring to someone who acts as an extension of the CEO—a true right hand.

Having a chief of staff can make a start-up, or scale-up, CEO and leadership team more effective. Here are some of the ways:

1. **Tracking actions in meetings.** The chief of staff attends all meetings that the CEO attends, with the additional responsibility of writing down action items. When a commitment is made, it's often down to the leader to follow it up and check that it actually happens. Offloading this allows the CEO to remain present and focused, reassured that the necessary actions will be tracked and followed up.
2. **Pre-screening meetings.** When a chief of staff arrives at a meeting before the CEO, they can check the agenda, start the meeting off—and quickly summarize things when the CEO arrives. And if the participants aren't sufficiently prepared? Well, the chief of staff

can glance at their phone and say, 'Oh I'm so sorry, the CEO can't make it—we'll have to postpone,' while simultaneously texting the CEO, advising them not to come. Genius, right?

3. **Playing bad cop.** Giving direct feedback is difficult, even for CEOs. I've often spent too much time trying to find the least confrontational way of delivering it and losing a clear message in the process. A chief of staff can play bad cop to your good cop. They can say things like, 'Okay, let me translate for you: this needs to be done by Friday or there'll be trouble!'

4. **Playing good cop.** As a CEO, it's hard to get used to the fact that words have added weight. Something intended as an innocent suggestion can leave the team in a state of confusion, turmoil, or even panic. The chief of staff can take the time to calm people down and ensure your message is correctly interpreted.

5. **Feeding back information.** It's scary for people to give feedback directly to the CEO—after all, their job may be at stake. The chief of staff can provide a safer channel for CEO feedback. Moreover, the chief of staff can also provide their own candid feedback, based on what they observe in meetings and hear around the coffee machine.

6. **Co-founder facilitation.** Relationships are hard, period. It's inevitable that co-founders will battle from time to time. When passions are high, discussions can get personal, especially behind closed doors. Having another person at the table is sometimes enough to keep co-founders on their best behaviour, making it easier to reach an amicable conclusion.

7. **Acting as a sounding board.** Have you ever asked someone for help, but when you started talking your problem through, you solved it yourself, with no help needed? Sound-boarding is an effective way to structure ideas and solve problems. A good chief of staff is a good listener, and a great chief of staff asks innocent questions, and innocent questions are routinely the best ones.

8. **Sharing the operational burden.** There are countless operational tasks that fall into the CEO's lap because they have nowhere else to live. The chief of staff can take over some of these administrative burdens. In scale-ups, one such area is recruiting and culture — especially at the stage before a full-time HR team exists.

'The chief of staff can take the time to calm people down and ensure your message is correctly interpreted.'

What to look for in a Chief of Staff

The chief of staff needs to be someone that the CEO can relate to and trust. Their characteristics may include:

- Diplomacy
- Organization skills
- Great interpersonal skills
- Listening and coaching skills

- Trustworthiness
- Facilitation
- Project management.

It's a difficult role with long hours, but it can be highly rewarding. The chief of staff learns directly from a business leader and gets a unique insight into the challenges of scaling companies.
And yes, there is a real return on this role. My own reports show CEO productivity rising by 20–50%, enabling the CEO to focus on where they can add the most value.

Give it some serious thought. How could a chief of staff help you become a more effective leader? And how would you measure their return on investment?

Dave Bailey is the CEO of Founder Coach, a coaching company dedicated to helping scale-up founders become great leaders. Dave previously co-founded three VC-backed companies, invested in 50+ start-ups and writes The Founder Coach Blog.

Further Reading

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