The Chief of Staff

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Decision Making
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The Chief of Staff

Volume 4, Issue 1
April 2022

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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

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 platform which elevates the voices, insights, and experiences of those in 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 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, curated forums and professional certification. 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. Education, Networking, Certification.

Education

The CSA strengthens and enhances the integrity of the chief of staff profession through a curated curriculum designed to equip members with the key skills, learned behaviours and experience required to excel as a contemporary chief of staff.

Networking

The CSA convenes the world's most influential chiefs of staff from leading private corporations, governments, not-for-profits and the military to advance connections and create the ideal conditions in which influential, long-term authentic relationships can be formed.

Certification

For members that want to gain recognition for their expertise, The CSA has designed a formal pathway to chief of staff certification. The journey to certification culminates with an immersive four-day residential programme delivered on campus at the University of Oxford, Saïd Business School.

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)

Dr. Chris Howard is the executive vice president and chief operating officer of the ASU Public Enterprise. Howard works closely with President Crow and the other executive vice presidents to coordinate enterprise-wide initiatives and advancement, oversee ASU Enterprise affiliates, advance new enterprise relationships and opportunities, and integrate ASU Enterprise planning and strategy. 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

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

Chairman (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 has had a career across diplomacy, academia, finance and law. He served as the Honorary Consul of the Republic of Moldova in Australia until 2019. Aron was educated at Harris Manchester College in the University of Oxford, where he read law, and also holds a PhD in intellectual property law from the University of Melbourne. He is the editor of *The Journal Jurisprudence* and has written three books.

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 (London, United Kingdom)

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.

Executive Education at the University of Oxford

The Chief of Staff Association has worked with Saïd Business School at Oxford University to create the Oxford Chief of Staff Executive Education 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.

Participants 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)

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

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 programme has been designed to support the personal growth and professional development of the next generation of chiefs of staff.

Our Core Competency Programme introduces Associate members to the key skills required to succeed as contemporary chiefs of staff. Associate membership also grants access to valuable Co-Elevation Forums and The Chief of Staff journal – a rich source of information and insights from career chiefs of staff.

Associates receive a distinctive Fattorini lapel pin and individualized calling cards.

Member (CSA)

Membership is your passport to 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.

The Chief of Staff Association has designed a comprehensive education programme that builds competency, capability, and performance as well as professional certification.

Our Core Competency Programme serves as the foundation of CSA's education streams, providing our members with integral skills that are fundamental to the chief of staff role. Curated 'Situation Rooms' facilitate peer-to-peer learning that challenges members to put skills into practice and develop learned behaviours.

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 Executive Education Programme at Oxford University represents the pinnacle of chief of staff specific education anywhere in the world and is available exclusive to members.

Members receive subscriptions to *The Chief of Staff* journal, individualized 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.)

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)

Ms Trier Bryant,
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Ms Petula Burks,
Chief of Staff to the Mayor of Augusta, Georgia

Professor David B. Cohen,
University of Akron

Mayor Hardie Davis Jr,
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Professor Chris Dolan,
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Professor Charles E. Walcott,
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International Committee of the Red Cross

Mr Dave Bailey,
CEO, Founder Coach

Letter from the Chief Editor

Dr Katherine Firth,
Chief Editor, The Chief of Staff

If our first year as a journal was dedicated to the question 'who, or what, is a chief of staff?', our second year starts strong with a new direction, with a special issue theme for each quarter. 'Decision-Making' is the theme of this issue, which we explore from politics, business, military, pop culture, philosophy, personal and historical perspectives. Integrating our work at the journal with the wider work of The Chief of Staff Association, we present a report on what's happening in the wider Association.

Our foreword is by the Hon. Ted Baillieu AO, former premier of the state of Victoria in Australia (from where I am writing this letter), reflecting on the challenges of the many roles of The Chief of Staff from the view at the top. Eryn-Ashlei Bailey, chief of staff at a medtech company, in our final article speaks about the challenges first-hand. These two articles frame the issue, and our discussions about decision-making, in the context of the complex role of the chief of staff.

How do people make decisions? We profile Chief of Staff Wilneeda A Emmanuel and Palm Beach County Commissioner Mack Bernard in a discussion of how they jointly approach the need to make decisions through their commitment to knowing and respecting one another. We also profile Sarah Cone, founder and Managing Partner at Social Impact Capital, as she unpacks how her ability to make decisions owes a surprising amount to her love of poker. Col. Mike Jernigan writes about how he balances the decisions he needs to take and the decisions he needs to support others to take, in his role as the Chief of Staff for Marine Corps Installations East.

"If our first year as a journal was dedicated to the question 'who, or what, is a Chief of Staff?', our second year starts strong with a new direction, with a special issue theme for each issue."

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, transferable skills, teamwork, effectiveness, communication skills, and expertise.

David Serabian, CSA member, ambitiously uses legal theory, a film starring Denzel Washington and Gene Hackman, and a classic business-school case to argue that the most important aspect of making a decision is knowing your principles. And Rhiannon Beaubien, author of The Great Mental Models book series, explains that making decisions is about how we understand the world, and that choosing the right mental model can help us change the world.

The learning doesn't stop there. A suggested reading list on the many, surprising, aspects of making decisions from my own research into the topic offers food for thought, and perhaps for conversation. We'd love to hear about what you are reading, or which of these suggested books and articles helped you, via our LinkedIn channels, or perhaps you might be interested in writing something for our new blog.

Issue 2, with a theme of 'Crisis and Change Management', has an exceptional roster of writers already working on their articles. Issue 3 'Information', and Issue 4 'Influence and Authority', still have openings for writers. If you have an idea for an article, please do get in touch. We are interested in hearing from the full range of chiefs of staff, across every industry, right across the world.

We hope this issue gives you insights into the decision-making process, and offers useful tools to chiefs of staff to make daily and long-term strategic decisions.

All Hail the Chief of Staff!: A Foreword from The Honourable Ted Baillieu AO

By The Honourable Ted Baillieu AO,
Former Premier of Victoria (2010–2013)

Politics is an unforgiving occupation. There are winners and losers – and little between. But in its undertaking there is no more important role than chief of staff. A chief of staff is critical to success, particularly for a Leader.

A good chief of staff is gold.

Yet, with success, a chief of staff inevitably enjoys little of the external credit. But if a chief of staff is seen to fail, critics will be quick to pounce and the chief of staff will go. Indeed, sometimes, those who seek to undermine a leader will start first on the chief of staff. And if a leader is seen to fail, it is still the chief of staff who will be first to go. And that 'going' is, usually, much more high profile than in the corporate world.

So why would anyone want such a role? By definition the financial rewards are modest, even at best. Tenure is no better. Prestige is tempered by the need to be effective and to not steal the limelight. A thoughtful candidate for chief of staff will anticipate having an appointment, regardless of promises, for two to four years. If it is a position in minority or Opposition, it may be even less.

What is seductive about the position is the same allure that draws people to politics – the opportunity to make a difference and to be at the epicentre of decision making. A touch perhaps of power without glory, of theatre from the dress circle and of course, the excitement of both the battle and the coliseum itself. And also the fastest track there is for learning and experience.

In that context all the traditional roles are key: gatekeeper, filter, advisor, trouble shooter, protector, operations manager and trusted confidante. That's the chief of staff role.

But the most important role will always be the 'staff' component. The selection, management and inspiring of staff in a political office is critical. Staff in such offices work under unique circumstances. Pressure, uncertainty and change are staples. Master the people and the team is halfway there. It's not called chief of staff for nothing.

All! Hail! The Chief ... of Staff!

Letter from the CSA Team

2022 promises to be an exciting year for The Chief of Staff Association, building upon another period of sustained growth for the profession. With members now drawn from over forty countries around the world, the CSA is a truly global and diverse network.

The year has started with a bang, having already delivered six education seminars hosted by an array of incredible speakers:

- Rethinking Immigration with Professor Zeke Hernandez
- The Power of Diplomacy with Capricia Marshall
- Building a Culture of Healthy Dissent with Dr Rachel Pacheco
- Getting to the Impossible YES with William Ury
- Driving Innovation in a Global Corporation with Anoushka Healy
- Leading at a Time of Crisis with Amanda Coleman

As the world begins to open up again after the COVID-19 pandemic, we are pleased to provide members with more opportunities to interact at in-person events and build upon the relationships they have forged in our online sessions.

On April 4th, we hosted members at The Cadogan, A Belmond Hotel for fine wines and canapes in partnership with Belmond (LVMH Group). This London meet-up focused on the theme of customer centricity and highlighted how Belmond has effectively implemented this principle to become the world’s most desirable luxury brand.

“We are pleased to provide members with more opportunities to interact at in-person events and build upon the relationships they have forged in our online sessions.”

In mid-April, forty-five members convened at the University of Oxford for the Chief of Staff Executive Education Programme. Led by Programme Director Rupert Younger, founder and director of Oxford University's Centre for Corporate Reputation, participants engaged in four days of immersive academic experience. The following keynote speakers and distinguished guests joined us throughout the week:

- Dame Carolyn Fairbairn DBE, former Director-General of the Confederation of British Industry
- Sir Alexander Younger KCMG, former Chief of the Secret Intelligence Service (MI6)
- Lord Sedwill KCMG FRGS, former UK Cabinet Secretary (2018–20) and National Security Adviser (2017–20)

After months of preparation, we were excited to see these events come to fruition and are particularly enthusiastic to initiate more face-to-face networking and educational opportunities going forward.

Building Strong Foundations:

A Profile of Wilneeda Emmanuel and Commissioner Mack Bernard

While Wilneeda Emmanuel was studying at the University of Florida, her father sent her an article featuring now Palm Beach County Commissioner Mack Bernard. At the time, Bernard had just been appointed to the Delray Beach City Commission. Wilneeda recalls reading the article closely and thinking: 'I want to meet him.'

Wilneeda would not only meet Commissioner Bernard but go on to manage his campaign in Palm Beach County and, eventually, serve as his chief of staff following their success in the 2016 election. Wilneeda pioneered the chief of staff role in Palm Beach County, creating and fulfilling a uniquely impactful position. After seven years of working in lock-step, the two have cultivated a close and supportive relationship. The unspoken trust they have forged is critical to Wilneeda's success as chief of staff as she and the Commissioner navigate complex decisions together.

Laying the Groundwork

Wilneeda and Commissioner Bernard did not have the luxury of time when first getting to know each other. As Bernard's newly appointed campaign manager, Wilneeda reflects 'we had to become close quickly.' In a county-level race, there is no room for ambiguity. Wilneeda needed to be in on everything.

However, this was met with resistance. As Commissioner Bernard explains, 'our campaign operation is very, very secretive.' When Bernard first brought Wilneeda on as campaign manager, his tight-knit team approached her with scepticism and were reluctant to supply her with critical information. Even the Commissioner himself was hesitant to open up to Wilneeda at first.

Commissioner Bernard is 'a man of few words.' With a knowing chuckle, Wilneeda refers to him as 'very guarded.' To successfully collaborate, Wilneeda had to break through to him. Frustrated with his wariness, she remembers telling the Commissioner: 'We are going to work together. I am going to have to let my guard down and you are going to have to let your guard down. That's the only way this is going to work.' As Wilneeda succinctly puts it, they had to 'allow each other to see each other.'

Committing herself to truly knowing and understanding Commissioner Bernard was integral to Wilneeda's management of their successful county commission race and has strengthened her ability to perform as his chief of staff. As gatekeepers to their principals, Wilneeda advises all chiefs of staff to 'actually know who you work for.'

Building Trust

To develop a strong working relationship, Wilneeda and Commissioner Bernard have established a foundation of trust. When asked how they developed this bond, Commissioner Bernard laughs and remarks that Wilneeda's late mother 'prayed for us a lot.' Beyond prayer, both have taken concrete steps to prove their loyalty over time.

Wilneeda jokes that she doesn't mess with 'metallic bracelets,' alluding to handcuffs. What she is really expressing through this quip is a promise to never jeopardise the integrity of the Commissioner or herself. Likewise, Commissioner Bernard emphasises the importance of respecting your chief of staff's ethical boundaries. For both, respecting each others' moral code is the foundation of establishing trust.

Commissioner Bernard also highlights the importance of supporting his staff's interests. Bernard goes out of his way to encourage his staff's professional development. Indeed, when Wilneeda approached him to discuss The Chief of Staff Association, Bernard was 'one hundred per cent for it.' In turn, Wilneeda reflects that she is 'honoured and humbled' to have 'a boss who is supportive.' She adds, 'and not only a boss, he is a great person.'

Commissioner Bernard and Wilneeda demonstrate that trust is essential to efficient decision-making. The Commissioner does not 'micromanage.' Instead, he encourages his staff 'to make tough decisions' just as he does. Importantly, he notes that 'even if they're wrong, I still will support them because I gave them the opportunity to make the decision.' This has always been Commissioner Bernard's philosophy.

"Even if they're wrong I still will support them because I gave them the opportunity to make the decision."

Managing Differences

Commissioner Bernard describes the decision-making process in his role as 'brutal.' The COVID-19 pandemic was particularly challenging as the Commissioner and Wilneeda were confronted with many highly consequential choices that could significantly alter the lives of their constituents. When it comes to making these types of decisions, conflicts and disagreements are inevitable.

Wilneeda and Commissioner Bernard have very different decision-making styles and personality types. When making a decision, the Commissioner explains that he prefers to not communicate often, albeit by design. Instead, he tends to 'go for it' and explain his rationale later. Wilneeda, on the other hand, 'loves to communicate.' As a result, she has had to adapt to his style of leadership, which often requires that 'you learn just by watching.' Over time, Wilneeda says: 'I had to realise that sometimes he can see further than I can and that he has a reason for everything.' Although the Commissioner may not explain everything in real-time, Wilneeda has accustomed herself to this and has faith in his decision-making process.

"I had to realise that sometimes he can see further than I can and that he has a reasoning for everything."

Similarly, the two also have different perspectives deriving from their generational gap. Wilneeda describes herself as a 'millennial type A personality.' She approaches problems from a contemporary angle that is often lacking in political institutions. For example, when considering potential vaccination campaigns, Wilneeda advocated for the utilisation of social media. She emphasised the importance of thinking beyond 'traditional' sites like Facebook and Instagram, highlighting other popular platforms like Snapchat and Tiktok. While she thinks these diverse perspectives are important, Wilneeda also acknowledges that she often defers to Commissioner Bernard and his practical experience.

Wilneeda and the Commissioner usually solve any disagreement with one another quickly. However, if a debate becomes more contentious, the pair have developed a forty-eight-hour no contact rule. Inspired by a professor who insisted that students wait at least forty-eight hours after receiving feedback to contact her and dispute grades, Wilneeda decided to implement a similar principle in the Commissioner's office. As Wilneeda sums up, 'it is a long road.' To maintain a sustainable working relationship under constant stress, they had to find a way 'to cool off from each other.' If a consensus cannot be reached, Wilneeda and the Commissioner take forty-eight hours to reflect. As Wilneeda explains, 'it just gives us both an opportunity to explain ourselves and make good decisions for all of our constituents.'

Mutual Respect

Wilneeda and the Commissioner have built a strong and productive relationship in large part due to their mutual respect for one another. As Commissioner Bernard describes 'we've just developed a trusting relationship and respect each other's strengths and weaknesses.' They have both taken the time to understand each other fully. While their personalities diverge, they have a clear respect for one another that allows them to make decisions in harmony and resolve conflicts as they arise.

Wilneeda still holds on to the article her father sent her in college about Commissioner Bernard. It is a reminder of the journey they have taken together from their first meeting and first campaign win to the close bond they have today.

***Wilneeda Anise Emmanuel** is a champion for diversity and inclusion in politics and government. Professionally, she is the Chief of Staff to Palm Beach County Commissioner Mack Bernard and successfully managed his county commission campaign. Ms. Emmanuel was recognized and participated as One of South Florida's 40 under 40 Leaders of Today and Tomorrow by Legacy Magazine, The Haitian-American Chamber of Commerce of Florida YoPro 40 under 40, Nominee of Young Professionals WOW Award by Central Palm Beach Chamber of Commerce, Congressional Black Caucus Institute Political Development and Leadership Graduate, Anti-Defamation League Glass Leadership Institute, and Leadership Florida Connect Class 11. More importantly, she attributes her successes to her late parents, Anise and Willy Emmanuel.*

***Mack Bernard** was elected in November 2016 to the Palm Beach County Commission, District 7. Mack ran for County Commission in order to put his experience to work for our community. He ran on a platform of creating more good paying jobs and job training opportunities; improving public safety and law enforcement relations; increasing small business, women and minority participation in county contracts; keeping taxes low; and advocating for more affordable and sustainable housing. Mack and his wife Shawn are raising their three daughters here and are very proud to be part of the Palm Beach County Family. As a real estate and tax attorney, Mack Bernard works to help others achieve the American Dream. Mack has put his life's work into giving back to our community and serving this great country.*

Transcribed and edited by Alexandra Atkeson, The Chief of Staff Association.

‘Impactful’ Decisions: A Profile of Sarah Cone

Sarah Cone has always been one of those ‘save the world type people.’ After graduating from college, she followed the path that many young altruists take and immediately went to work in the non-profit sector. However, after five years Sarah began to feel disillusioned. As she explains, ‘I sort of picked up my head and looked around the world and thought: You know? I really haven’t moved the needle on saving the world as much as I would have liked to.’ With this revelation, Sarah went back to the drawing board.

Taking inspiration from start-ups and venture capital firms while retaining her commitment to world betterment, Sarah conceived of the concept behind Social Impact Capital. After fifteen years of researching and preparing, Sarah raised Social Impact Capital’s first funds in 2019, kickstarting their ongoing success story.

Putting in the ‘Pre-Work’

Sarah often jokes that she has the most inspiring Inbox in the world. Waking up to ‘hundreds of emails about how to solve the world’s hardest and most entrenched problems’ means that Sarah must constantly prepare to make difficult decisions that dictate the direction of the firm. Sarah emphasises the importance of ‘pre-work’ to navigate this information overload. While she is the decision-maker at Social Impact Capital, Sarah relies on her team to gather the background research that guides her thought process.

Helping to change the world is a monumental task. The goal of Sarah and her team’s ‘pre-work’ is to identify areas where they can make an outsized impact. Referencing Buckminster Fuller’s concept of ‘trim tabs,’ Sarah says, ‘you are looking for the small wedge that you can move, and it ends up turning this large ship.’ Once she identifies these ‘trim tabs’, Sarah and her team narrow in on what is important.

“You are looking for the small wedge that you can move, and it ends up turning this large ship.”

Although Social Impact Capital is ‘a very research-driven firm,’ Sarah leaves room for moments of spontaneity in her ‘pre-work’ process. She explains, ‘sometimes we’ll run across a completely amazing idea that we hadn’t even considered.’ For this reason, her team ‘works both ways,’ remaining adaptable throughout the planning and fact-finding phases.

Seeing All Sides

As Sarah goes through the fact-finding and pre-work process, she engages herself in an internal debate, making arguments for all sides of a potential decision. Sarah often draws on her experience from law school by using a ‘dialectical’ thought process to make choices, playing out a ‘mini court proceeding’ in her head. She jokes, ‘to the outside world this sometimes makes me look crazy’ because she often takes polar opposite positions from one day to the next. However, this step in her decision-making process is crucial for anticipating and preparing for multiple outcomes.

When it comes to making well-reasoned decisions, Sarah emphasises the following advice: ‘Do what you can to structure the external environment of the decision to mitigate the downside risk.’ To accomplish this, Sarah thinks her way through the worst-case scenario. For example, when getting married, Sarah asked herself: ‘Would this husband be good in a divorce?’ Thinking through potential failures allows her to better prepare for and minimise downside risk.

“Do what you can to structure the external environment of the decision to mitigate the downside risk.”

Similarly, when selecting seed-stage businesses to invest in, Sarah has developed her own heuristic to account for the possibility of derailment. When evaluating firms, Sarah asks herself: ‘If the most evil company in the world acquired this company that I may invest in, would they be able to remove the social good component without the business going zero?’ If the answer is yes, Sarah doesn’t move forward.

Managing the Unknown

While ‘pre-work’ and dialectical thinking eliminates many uncertainties, all decisions are made with incomplete information. To mitigate unknowns, Sarah adopts a collaborative approach. While she carries responsibility as the firm’s executive decision-maker, she approximates that there are 40 to 60 people who supply information for every decision she makes. As Sarah listens to others’ experiences and perspectives, she has one central goal in mind: ‘What I am really looking for when I talk to these people are the things that I don’t know that I don’t know.’[1]

Gathering data from others is vital to making informed decisions, but there are some circumstances where facts are insufficient or unknowable. While Sarah describes herself as ‘famously bad at trusting my gut,’ she highlights the importance of gut decisions as a ‘valid method of decision-making.’ As she puts it, ‘our unconscious is actually one of the biggest fact-finding engines in the world.’ Our gut stores data that our conscious mind may not be perceptive enough to pick up on, which is why Sarah believes ‘gut decisions tend to be the best decisions.’

“Our unconscious is actually one of the biggest fact-finding engines in the world.”

Placing Bets

Much of Sarah's perspective on decision-making can be traced back to her appreciation of poker. The day she moved to California from Washington DC to begin her first venture capital role, Sarah was invited to participate in a poker game against her new colleagues. Unfamiliar with the rules of the game, Sarah poured over books about poker the entire flight. On arrival, she was prepared and exceeded expectations. Sarah still has a keen interest in poker, although her prowess intimidates some. She jokingly remarks that nowadays 'people really don't like playing poker against me, so I am not invited to too many games.' Nevertheless, she believes that poker provides invaluable lessons for decision-making processes. For Sarah, poker is 'a disciplined game of how to make decisions when you have imperfect information.'

Poker is easily paralleled to the methodology of venture capital. While in poker you are 'making bets and then turning over cards,' in venture capital you are 'paying to overturn a certain card and getting more information.' For Sarah, playing the game has accustomed her to making choices in the presence of unknowns. As Sarah explains, poker teaches you that 'you don't have to come up with the right decision; what you have to do is make a right-sized bet for the decision environment that you are in.' Knowing how much to risk in the face of uncertainty is not only central to success in poker but in all decision-making scenarios.

"You don't have to come up with the right decision; what you have to do is make a right-sized bet for the decision environment that you are in."

Recovering from Failures

Over the long term, poker serves as a testament to the concept of 'strategy over luck'. In poker, Sarah clarifies, 'you are trying to have a decision-making process that leads to the right outcome in the majority of situations.' While there are games where a player wins after getting some 'ridiculous card on the river,' Sarah loves that experienced players will not congratulate the winner on their lucky hand. Instead, she says, 'they actually congratulate you because they can tell that you have played smart poker.'

This is why she believes poker has a lot to teach when it comes to accepting mistakes and disappointments. Sarah has embraced this lesson, acknowledging that 'even if you have the right process and you win most times, you are always going to have these sorts of spectacular painful failures. Poker teaches you to just really ignore those.'

"Even if you have the right process and you win most times, you are always going to have these sorts of spectacular painful failures. Poker teaches you to just really ignore those."

Despite the layers of thought and preparation that Sarah goes through when making decisions, mistakes and failures are unavoidable, particularly in venture capital. Instead of lamenting over missteps, Sarah focuses on developing a decision-making strategy for sustained success.

Sarah Cone *is the founder and Managing Partner at Social Impact Capital. Referred to by Forbes as a 'risk-taker who has proven herself,' Sarah is an experienced venture capitalist who has proven that impact investing can generate strong financial returns while producing a positive effect on the world. Sarah invests from the earliest stages in founders that have innovative and impactful solutions to the world's most pressing challenges.*

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Making and Managing Decisions

By Col Mike Jernigan

'Chief, the White House is on line 2. The First Lady wants to visit in three days.'
A Major stood in front of my desk and said, 'The Weather Guessers determine there is a 78% chance the storm will form into a hurricane and likely be headed our way by the end of the week.'
A Corporal handed me a note, 'The Commanding General of one of our tenant commands is wondering why the parking lot to one of his battalions is flooding.'
A third person said, 'It's going to snow in Washington, DC this afternoon, and the Secretary of the Navy needs to shorten his visit by two hours. What do we cut out?'

Codes classify job types in the military to match job requirements to personnel qualifications. In the United States Marine Corps, these codes are called Military Occupational Specialties (MOS) and denote everything from Basic Rifleman to Astronaut. Interestingly, there is no MOS for a chief of staff. Perhaps that is because the complexity of the role of the chief of staff cannot be summed up in a simple administrative code. Whatever the reason, chiefs of staff have a lot of 'learning as you go' and require a variety of skills. Chief among them is a keen decision-making ability.

I currently serve as the chief of staff for the organization that encompasses one-third of the Marine Corps' worldwide bases. A typical day is filled with a variety of decisions, some of which are illustrated above (thankfully, these were not all on the same day – but some days are like that!). Good decision-making must incorporate three factors: the adept decision-maker must understand whose decision it is, the timeliness the decision requires, and how the decision is made and communicated.

Decisions that face chiefs of staff fall into four categories of responsibility. These categories of responsibility are as follows: those made by your boss, those made by you, those made by subordinate leaders in your organization, and decisions made by other staff members in the organization. Each of these decisions requires a different level of effort and attention from a chief of staff.

The decisions your principal must make, by definition of the job as a chief of staff, require most of your focus. The information must be gathered, courses of action analyzed and proposed, and the right people must be available when the boss requires input. All of these factors are in the job jar of a chief of staff. Some decisions can be made intuitively or by simply reading options on paper. Other decisions require opposing positions to make convincing cases. The job of a chief of staff is to coordinate the gathering and presentation of information in a timely and compelling fashion to give the principal the best opportunity to make a well thought out decision. Decisions for your boss come in all flavors and require a different application of mental energy and thoughtfulness. It is a chief of staff's responsibility to know the difference and prepare accordingly.

While supporting your boss' decisions is a primary function of a chief of staff, there are decisions only you can make. In my role, I have eight Assistant Chiefs of Staff who work for me. Each would be classified as Directors or Senior Directors in organizations outside of the military. They all have large teams to manage and speciality cones to run (Operations, Logistics, Human Resources, etc.). One of my decisions is to approve their vacation days. I have to synchronize their vacation so somebody is always 'manning the tiller'. I have to balance the schedules of the principal staff officers and their deputies with the potential absences of the other Assistant Chiefs of Staff.

"There are decisions only you can make."

In perhaps more than any other organization I know of, the succession of command in the Marine Corps is vital. Somebody is always in charge, and that somebody has to have somebody behind them to take charge in the event of A Very Bad Day. Approving vacation is a seemingly routine decision… until you get to the Christmas and New Year's week when everybody wants off simultaneously. The best way to get yourself off of a Christmas Card List is to cancel Christmas! I have to decide how to manage leadership coverage for every section and balance the organization's needs with the individual's desires. These are my decisions to make - if I don't make them, they don't get made. You have similar 'chief of staff' decisions that only you can make. Make them. Nobody else can.

The third type of decision-making category of responsibility that chiefs of staff must be aware of concerns the decisions made by the leaders in the organization that are subordinated to The Boss. The chief of staff must support the decisions of subordinate leaders when they are in the theme of the vision set by the principal. When they are not on the correct vector, the chief of staff must help the decision-makers understand why the decisions are out of sync with the direction of the organization or principal's guidance. A significant part of good decision-making throughout an organization is the ability of the chief of staff to provide a sounding board and safe workspace for others to consider ideas and options for leaders at all levels of the organization. The chief of staff doesn't have the time or ability to make all the decisions in an organization. They must enable the decision-making of others in the theme of the organization's vector.

The remaining decision-making category of responsibility is the decisions made by everybody else in the organization. These are the hundreds of daily micro-decisions teammates make to keep the organization operating. Are we preserving the brand? Should I schedule this meeting for tomorrow or Tuesday? While chiefs of staff cannot be aware of these decisions in their entirety, they serve as a barometer of the organization and need to maintain a pulse of what is going on across the whole enterprise. Personally, I do this by getting out of my office several times a week, visiting people in their workplace, and asking what they are working on. This stakeholder engagement technique helps me understand how the Big Boss' vision is getting translated down and whether the organization is operating productively. Ultimately, chiefs of staff effectively bring information from the lowest to the highest levels quickly.

On one of my walkarounds, I discovered that our new accounting system was rolled out with an incomplete training package. People in the next building told me that they had contracts for necessary services getting dropped because the accounting system was not paying vendors. Within a few days, people all over the organization's breadth reported the same challenges. I took this information to the Commanding General, he informed his boss, and we realized the entire Marine Corps was facing the same issue. We stood up as a team to address the challenge. Meanwhile, a teammate decided to focus on the part of the process where the paying system communicated to the vendor. On his own initiative, he worked late into the night and mapped out a series of steps to force the correct data into the accounting system.

The process was cumbersome and tedious, but it worked. He demonstrated it to me, and I again took it to the Commanding General. He then published it to the senior leaders of the Marine Corps, and the 'solution' spread to other organizations who applied it. The innovative teammate made a small decision to focus on a small part of a complex challenge that benefited the entire Marine Corps. Chiefs of staff have a responsibility to enable the decisions of others for the good of the organization. As explained by leadership author J. Oswald Sanders, 'A leader must use the best ideas of others to make decisions.'[1]

"Organizations work like gears."

Another role of a chief of staff in organizational decision-making is understanding when particular decisions need to be made. The chief of staff is the keeper of both the principal's and the staff's flow and pacing. Some decisions need to be made now: 'the building is on fire. Do we go down the front or back stairs?' Some decisions need to be made soon, others later. An additional category of time-influenced decisions is where the most productive organizations spend significant time – thinking about potential decisions before getting to 'now' or 'soon'. Therefore, the chief of staff must manage and assist all these decision timelines, from the 'now' through to the 'perhaps when'. They must use the time available for decisions to be made 'later' and not get distracted by non-essential variables for decisions that need to be made 'soon'.

Chiefs of staff must also understand how decisions are made and communicated. I have a theory that organizations work like gears. Imagine a series of intermeshed gears. High school physics tells us that each successively smaller gear moves faster around its axle than the one before. This means that when the biggest gear moves a notch, the next one down moves a bit faster, and the one after that faster still. So, if the biggest gear moves faster than one notch at a time, then the littlest gear at the end of the line is moving as fast as it possibly can. The same is with emotions and decisions in organizations. Suppose the leader at the top has strong emotions. In that case, these emotions are amplified throughout successive levels of the organization as each subordinate leader responds to the emotion and adds their own emphasis as the effects of the decision work through the layers of the organization. Thus, it is beneficial for senior leaders to make measured decisions with minimal emotion as often as they can.

Chiefs of staff need to think about the consequences of decisions. Decisions, by definition, come with effects. These effects have intended consequences, and sometimes, unexpected ones. When the consequences of decisions directly affect people, I have found it helpful to separate the emotion from the decision at the start of the decision-making process. Examine the merits of each option, think through potential consequences, and decide what is best for the organization and the situation at hand. Then, after the decision is made in your mind but before it is published to anyone else – put the emotion back in to examine how the decision appears to other people, those affected by it and those observing from the outside. Usually, I find this technique to be a helpful lens to appreciate the impacts of a decision while not dwelling on them early in the process.

"Decisions, by definition, come with effects."

Successful negotiations are frequently marked by outcomes where both sides gain. Win-win positions are also applied to decision-making when the decision-maker works to create an outcome where multiple positions are favorably enhanced. This goal is admirable. However, the chief of staff must recognize that win-win decisions are not always best for the organization. Many sports teams have individual athletes' names on the back of their game uniforms to help announcers and fans identify them, but almost all teams have the team's name on the front of the jersey. Similarly, chiefs of staff have to play for the name on the front of the jersey more than the name on the back; they must keep the bigger picture of the organization in focus at all times.

One of my responsibilities is to manage the payroll for the non-military employees in our organization. I chair the Personnel Management Review Board as a mechanism to determine when and how many new employees we can hire, or how many of those who are leaving we can afford to replace. Let's say that the Director of Logistics wants to hire another employee. She coordinates with the Human Resources Director and determines that we have the capacity for a new hire. They then coordinate with the Comptroller, who determines that the organization has enough space to hire another employee in the Manage to Payroll budget. It seems like a win-win-win, except the chief of staff knows that a 15% payroll cut is projected for the following year. It is not in the organization's best interests to hire someone only to let them go the next year – or to keep them and operate over budget. Chiefs of staff must always keep the interests of the larger, entire organization in mind over the interests of specific staff sections.

Chiefs of staff must have a bias for action. Former Chairman of the Joint Chiefs of Staff, General Peter Pace, explains his perspective eloquently: 'Be a proactive decision-maker. It is better to get your butt chewed for going too far rather than not doing enough. Remember, it is always easier to get forgiveness than permission.'[2] Decisions are not like wine; they don't get better with age. When the chief of staff waits, the entire organization waits. Yes, some decisions require research. Yes, some decisions are complicated and require time to work through the options and implications. Preparation takes time, but it should not be drawn out when it comes time to make the actual decision. You can increase the speed of the decision-making process by not waiting until the issue is in crisis before acting. A former 1st Marine Division commander was fond of saying, 'small, frequent, rapid decisions will save you from having to come up with a big decision at the eleventh hour.'[3]

Much of a chief of staff's job is relational, and decisions cannot be separated from people.

A chief of staff needs to understand the people on the team along with their tendencies, personalities, and capabilities when making decisions. Some teammates are long-winded or give overly elaborate explanations - best not to put these in with The Boss at the end of a long day. Other staff members don't do their homework and conduct discovery learning in the Boss' office. These types may be better to pre-brief you and answer all your questions before you say, 'How about I take that decision for you and get an answer from the boss?'. Still, other teammates may be deliberate thinkers who need the exposure and credit for their excellent ideas. A chief of staff must know his teammates and his boss' likely reactions to them or their presentation style. Frequently a decision can be made rapidly because the correct person is – or not – briefing the salient points.

Chiefs of staff are the caretakers of decision-making in complex environments and require a collection of abilities. They need to be fluent in the four categories of decision-making responsibility and adept at managing all their variables simultaneously. Chiefs of staff must prepare the boss for his decisions and coordinate staff participation according to the boss' needs while making chief of staff-specific decisions in a timely fashion. Simultaneously, chiefs of staff must coach and support subordinate leaders in the organization as they make their decisions and keep an eye out for decisions made across the breadth and depth of the organization to serve as an effective conduit of information.

Chiefs of staff serve as an organizational lubricant and manage the human factors required in decision-making across the enterprise. These responsibilities include coordinating the timing required for specific decisions, communicating the decisions, and ensuring all involved can correctly anticipate the consequences and outcomes of decisions made. Leadership author Donald Philips provides a concise roadmap for helping chiefs of staff understand the critical parts of a decision-making process. He writes, 'when making a decision, gather information and understand the facts, consider various solutions and their consequences, make sure that the decision is consistent with your objectives, and effectively communicate your decision.'[4]

In sum, decisions are functions of the experience of the people who make them, effective use of the time available to decide, and the human factors surrounding them. More than in any other role in an organization, chiefs of staff must be equally adept at making decisions, deciding when decisions need to be made, and managing the decisions of others.

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A Decision-Making Open Reading List

By Dr Katherine Firth

An open reading list, or open syllabus, is designed to offer an introduction to the 'literature' in a field. It's a way for someone who is just getting started to identify the major works, the foundational texts, but also to develop a more rounded understanding of the issues through incorporating contrasting approaches and points of view. We suggest some of the expected classics of the business thinking literature, and some more diverse, provocative or experimental approaches. As an open list, the books and articles recommended are typically available at mass-market prices, from your local city library, or open-access online.

Decision-making in a complex, fast-paced and unprecedented time may be messy and imperfect. Many of the books here recognise that we make decisions in habitual, non-rational, emotional or speculative ways: some work to help us access our logical, calm and intentional decisions, others offer strategies to develop better habits, emotions and guesses. These are books I have read, enjoyed, and found made me think more deeply about how or why we make decisions. Some of these approaches I have found useful in teaching others to make decisions, some I have incorporated into my own practice, and some have just been interesting ways to unsettle my assumptions.

A semester is 12 weeks long, and a quarterly journal typically gives you about the same amount of time before the next issue arrives. However, an Open Syllabus differs from a university syllabus in that no-one will be checking on your progress, there will be no pop quizzes and no exams. A reading list is, by definition, only a first glance at a field, and so many excellent books have not been included. For each book, there is also a follow-up text, sometimes another book in a similar vein, sometimes some academic research. Each area is a full specialisation in itself, so perhaps you will pick a trajectory and pursue that more deeply. Choose your own adventure, and reflect on what it means to make decisions.

Daniel Kahneman, *Thinking Fast and Slow* (2011)

The classic text about decision-making, based on half a century of research and by a Nobel Prize winning economist, *Thinking Fast and Slow* identifies the different modes of thinking which influence our decisions, which he defines as System 1, automatic and quick decisions that use intuition, heuristics, biases, and habits; and System 2, which are about intentional, logical decisions using attention and effort, and that can be disrupted by interruptions. Kahnemann argues that most of our decisions are made in System 1 mode, both the source of most of our errors and most of our good decisions too.

Part 4, 'Choices' is particularly relevant to decision-making, identifying that people often make decisions to avoid negative outcomes, to avoid risk, loss or regret. Organisations, however, with their slower and more explicit decision-making processes, have the chance to disrupt System 1 decisions, helping individuals to make better decisions.

Kahnemann was highly influenced by a trader, philosopher and mathematician **Nicholas Taleb, in *Black Swan: The Impact of the Highly Improbable* (2nd edition, 2010)**, particularly in Part 2, 'Overconfidence'.

Brene Brown, *The Gifts of Imperfection* (2010, new edition 2020)

Brown starts where Kahnemann's 'Choices' left off. Sometimes individuals are focused on making the 'right' decision because they are afraid of failing, they want to avoid feelings of shame and embarrassment. However, making choices to avoid potential negative outcomes can get in the way of making good, brave or exciting decisions. Brown's book encourages readers to be vulnerable as a way to be strong and make decisions led by their values and passions, not by fear of getting it wrong. Perfectionism is impossible and counter-productive in fast-moving and complex environments, so embracing effective imperfection may be a more productive model.

Emotions are often at the centre of the way we make decisions, as Kahnemann also reminded us, so this book is helpful to think about whether emotions are about wanting the best for the whole team, or about avoiding individual feelings of inadequacy.

Brown is a prolific author in this field, and ***Rising Strong* (2015)** is another relevant addition to the reading list, about what to do after people make a mistake or fail, since even if the decision ended up not succeeding, failure is not the end of the story.

Edward de Bono, *Six Thinking Hats* (1985, updated edition 1999)

Having more than one person contributing to a decision, and consciously slowing down the decision-making process, can enable better and more thoughtful decisions. One strategy to achieve that is offered by philosopher Edward de Bono, with his six different 'thinking hats'. Each hat can be used to encourage a particular kind of thinking, to try out different approaches to a single issue, or to assign roles to team members to robustly stress-test a decision. Each different hat uses a different decision-making approach: facts, emotions, caution, optimism, creativity or metacognition.

In explicitly giving people a way to think about thinking, de Bono offers a simple schemata for practical use. The metaphor of coloured hats that can be tried on and then taken off, is playful. Increasingly, research shows that play is a highly effective way to explore and rehearse potential paths of action.

In a sense, the hats function as dress-ups, and encourage play-acting. 'Serious play' is a widely-used model for exploring and developing decision-making skills by researchers, for example in **Rumeser, David, and Margaret Emsley. 'Can Serious Games Improve Project Management Decision Making Under Complexity?' Project Management Journal 50, no. 1 (February 2019): 23–39.** https://doi.org/10.1177/8756972818808982.

Kelly McGonigal, *The Upside of Stress: Why Stress Is Good for You, and How to Get Good at It* (2015)

McGonigal brings her psychologist perspective to the benefits of stress. As the founder of modern medical stress studies, Hans Seyle argued: there is both 'distress', the bad stress that makes us unhappy and sick; and 'eustress', the good stress that makes us energised and excited. Stress can improve memory and focus, and can improve the ability to deal with fast-moving or risky situations. Thus good stress can be a useful tool in decision-making.

McGonigal uses the work of Alia Crum to encourage a deliberate use of choice in deciding on a stress mindset: that is not assuming that stress is always toxic or always beneficial, but rather taking a flexible and deliberate approach. Crum has a TEDx talk on mindsets (https://www.youtube.com/watch?v=0tqq66zwa7g), but to really explore the benefit of mindsets, the next step is to read **Carole Dweck, *Mindset: The New Psychology of Success*** (2006, updated edition 2016).

Thich Nat Hanh. *The Miracle of Mindfulness* (1975)

The Vietnamese monk, Zen master and peace activist Thích Nhāt Hanh is widely credited as bringing the Buddhist practice of mindfulness to the West. Where many of the other books in this reading list focus on the past (through stories and memory) or the future (through predictions), this book brings attention specifically to the present moment and the present action. Using everyday actions, like washing dishes, eating a section of tangerine or walking along a path, Thích Nhāt Hanh encourages people to learn to do the action in the present moment, with full attention. If people 'wash the dishes to wash the dishes', he suggests, they will be fully present in their actions, calmer and more deliberate, and less overwhelmed by outside forces.

While the past and the future are significant in the ways people think about making decisions, the only time a decision can be made is in the present moment. Moreover, of course, the only time people are actually alive is in the present, so Thích Nhāt Hanh says that being distracted from the present means we are not fully living. Thích Nhāt Hanh also provides a model of meditation that, rather than clearing the mind completely, fills the mind with breath, awareness of the body, and of the moment. This kind of meditation was important to his choices in being active in the world.
Increasing research is showing the effectiveness of mindfulness for effective decision-making. If this path is one you want to walk further down, **Pema Chödrön, *The Places That Scare You: A Guide To Fearlessness*** (2001) may be the next step.

Barbara Scher, *Refuse to Choose: Use all of your Interests, Passions, and Hobbies to create the life and career of your Dreams* (2006)

Chiefs of Staff are often generalists, shifting diagonally across their careers from one technical area to another, to management and strategy and across to operations. Scher identifies a 'scanner' type, someone always keeping their eye on the horizon rather than diving deep into a specialism, with lots of passions and interests, who struggles to commit to just one project. Scher argues that rather than reflecting the failure to make a choice, this can be a strength.

The book is designed as a workbook, and identifies both the 'scanner' type (in contrast to the deep 'diver') but also multiple sub-types. There is increasing scepticism about the utility of typographies in the literature, from Myers-Briggs to Learning Styles to astrology, particularly when the typographies are used to limit or fix identities. Where the typographies can be used to expand the narratives about what is possible or beneficial, however, they can be useful.

For a profile of a diagonal pathway, Chief of Staff at Google Libby Dabrowski was inspired by **Sheryl Sandberg's advice** from ***Lean In: Women, Work and the Will to Lead*** (2015) in ***The Chief of Staff journal***, December 2021 issue.

Jeremy Dean, Making habits, breaking habits: how to make changes that stick (2013)

Dean argues that if a third of people's working hours are running on autopilot, then it's important to ensure that the autopilot hours are aligned with what you actually want to do, and that your habitual decision-making processes are fit for your current role. Habits are efficient, quick and boring, so building habitual practices will help you keep up the pace and down the stress at work.

Dean goes beyond the simplistic mantra that you only need to do something for 21 days (especially for complex new habits), without falling into the fallacy that habits are just how we are and we can never change.

If you enjoyed the The Upside of Stress, you might want to jump into another book by Kelly McGonigal, ***The Willpower Instinct: How Self-Control Works, Why It Matters, and What You Can Do to Get More of It*** (2011) which looks at the motivation and consistency to break habits.

Sara Ahmed, *Willful subjects* (2014)

A decision is an act of having a will, and attempting to impose that will on the world. This book is some pretty dense philosophy, by one of the most disruptive thinkers working currently in the field. Ahmed both expansively surveys the history of ideas on the will, from Augustine, Rousseau to Hegel and Arendt, and locates her explorations in those people who are socially discouraged from expressing their will. The metacognition about will, willingness and willfulness, in human beings, but also specifically in relation to gender, sexuality and race, is intended to disrupt assumptions about who is encouraged to exercise free will, and who should accept another's will being imposed upon them, towards greater inclusion and freedom.

Research shows that we instinctively feel comfortable in homogenous teams, but actually make better decisions in diverse teams. The call for disrupting the status quo thus becomes both moral and practical. Ahmed's argument is moral, she is interested in justice and liberation, impacting the political, economic and social realms. Not an easy read, but one that will make you think hard.

If you want to read the practical arguments for why diverse teams are more effective, see this overview by **David Rock and Heidi Grant, *'Why Diverse Teams Are Smarter'***, in the ***Harvard Business Review* (2016)**, https://hbr.org/2016/11/why-diverse-teams-are-smarter or go straight into the deep-dive research, for starters with Levine et al., **'Ethnic diversity deflates price bubbles', *PNAS*, (2014)** https://doi.org/10.1073/pnas.1407301111 (open access)

Timothy D Wilson: *Redirect: Changing the stories we live by* (2011)

Writing as a psychologist, Wilson reminds us again that decision-making is not only about gathering data, analysing it and acting on it, but that people fit that data and decisions into bigger narratives about their lives and how the world works. Editing the story of our lives can help people to make more effective big-picture decisions, he argues, for example moving from 'I made a mistake which proves I don't belong in this position' to 'I made a mistake so I should take on feedback and next time I'll do better'. As well as being shaped by reality, decisions in turn can create reality going forward.

Wilson's book spends a lot of pages looking at how university student's self-limiting beliefs impact their decisions about what careers and specialities to pursue. A common self-limiting belief is that some people are just no good at maths, and therefore must avoid any quantitative or technical fields of expertise. **Barbara Oakley, in *A Mind for Numbers: How to Excel at Math and Science* (2014)**, debunks this belief and demonstrates how anyone can learn to be good at numerical thinking.

Jennifer Ackerman, *The Genius of Birds* (2016)

Thinking about how animals make decisions—from creativity, tool use, awareness of other people and of the future—can also help us to reflect on how we make decisions. Animal brains are far more complex than we previously understood. 'Bird brained' is an insult that assumes that the smallness of avian brains was linked to simple intellectual abilities, however, we now know that birds have a different structure of the brain, densely packed with neurons. Birds are able to solve problems, using creativity, building tools and predicting others' behaviour. They use curiosity, learned behaviour and instinctual reflexes in navigating the world.

If this line of reading takes you down a 'rabbit-hole' of animal cognition studies, you may also enjoy philosopher of science **Peter Godfrey-Smith, in *Other Minds: The Octopus and the Evolution of Intelligent Life* (2018)**.

Vyāsa, ‘Bhagavad Gita’ in the *Mahabharata* (n.d.)

The ‘Bhagavad Gita’, a classic of Hindu philosophy, is a chapter in the epic Mahabharata where Arjuna is paralysed by doubt and feels unable to take the decision to fully defeat his cousins in the battle for the throne. By delaying, his charioteer avatar of the god Krishna reminds him, Arjuna is causing greater suffering for all. A reflection on duty, purpose, action and violence.

There are many translations of the ‘Bhagavad Gita’ into English. **Gavin Flood and Charles Martin’s translation *The Bhagavad Gita* (2015)** has good contextual material as Norton critical editions often do. If you want to read the Gita in the context of the sweeping Mahabharata, to fully understand the stakes, I recently enjoyed **Carole Stayamurti’s translation of the *Mahabharata (2020)*.**

If you are inspired to unpack into other ancient reflections on decision-making, you might read next Marcus Aurelius Antonius (CE 121–180), Stoic philosophy and emperor of Rome on living according to your deepest principles and clearest attention during times of crisis and risk. Again, there are many translations, but **Marcus Aurelius, *Meditations: A New Translation,* with an Introduction, by Gregory Hays (2003)** is direct, immediate and powerful.

Jessica Dore *Tarot for Change: Using the Cards for Self-care, Acceptance and Growth* (2021)

For millennia, humans have used external tools of chance to help them make decisions: runes, dice, the entrails of animals, tea leaves, crystal balls, coins and cards. Such tools relieve the responsibility of choice making. Sometimes these tools are used to give a (random) answer, and sometimes they function as tools to provoke reflection. Dore is a licensed social worker with a background in psychology and behavioural science, and in this book she proposes a new way of looking at the tarot deck as a tool for reflection, as messages from ourselves rather than from some otherwise unknowable future. Dore also uses psychology, mythology and folklore.

In situations where the right choice is unknowable, or where humans are likely to make bad choices, a random throw of the dice or flip of a coin might be as good a tool as any. If you are interested in random decision-making, dive into the academic literature, starting with **Biondo et al., ‘Are Random Trading Strategies More Successful than Technical Ones?’ *PONE* (2013)** [https://doi.org/10.1371/journal.pone.0068344 (open access).](https://doi.org/10.1371/journal.pone.0068344)

What are you reading this quarter? We encourage you to share your own reading lists via LinkedIn (tag the Chief of Staff Association so we can read what you are reading!), or explore other ways of developing your knowledge is through our regular webinars, or even the Oxford Chief of Staff Executive Education Program.

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Mental Models to Improve Decision-Making

By Rhiannon Beaubien

In any area of life, the person with the fewest blind spots wins. Removing blind spots means we see, interact with, and move closer to understanding reality. We think better. And thinking better is about finding simple processes that help us work through problems from multiple dimensions and perspectives, allowing us to better choose solutions that fit what matters to us.

Decisions based on improved understanding will be better than ones based on ignorance. While we cannot predict which problems will inevitably crop up in life, we can learn time-tested ideas that help us prepare for whatever the world throws at us. At Farnam Street, we've written extensively about the power of mental models to help us make better decisions.

A mental model is simply a representation of how something works. We cannot keep all of the details of the world in our brains, so we use models to simplify the complex into understandable and organizable chunks. Whether we realize it or not, we then use these models every day to think, decide, and understand our world.

Largely subconscious, mental models operate below the surface. We're not generally aware of them and yet they're the reason we consider some factors relevant and others irrelevant when we look at a problem. They are how we infer causality, match patterns, and draw analogies. They are how we think and reason.

"Largely subconscious, mental models operate below the surface."

While there are millions of mental models, some true and some false, Farnam Street focuses on the ones with the greatest utility—the all-star team of mental models. Put to proper use, they will improve your understanding of the world we live in and improve your ability to look at a situation through different lenses, each of which reveals a different layer. They can be used in a wide variety of situations and are essential to making rational decisions, even when there is no clear path. Collectively they will allow you to consider any problem in a three dimensional way.

In order to see a problem for what it is, we must first break it down into its substantive parts so the interconnections can reveal themselves. This bottom-up perspective allows us to expose what we believe to be causal relationships and anticipate how they will govern the situations both now and in the future. Being able to accurately describe the full scope of a situation is the first step to understanding it.

Using the lenses of our mental models helps us illuminate these interconnections. As more lenses are used on a given problem, more of reality reveals itself. The more reality we see, the more we understand. The more we understand, the more we know how to act. Using mental models is a way to be active and thoughtful during our decision-making process. Being active doesn't guarantee great outcomes every time, but it does mean we are more likely to deal with the world as it is and improve our chances of success.

The power of acquiring new models

The mental models in our heads largely influence the quality of our thinking. While we want accurate models, we also want a wide variety of models to uncover what is really happening. The key here is variety. Most of us study something specific and do not get exposure to the big ideas of other disciplines. We do not develop the multidisciplinary mindset that we need to see a problem accurately. And because we do not have the right models to understand the situation, we overuse the models we do have and use them even when they do not belong.

You've likely experienced this first hand. An engineer will often think in terms of systems by default. A psychologist will think in terms of incentives. A business person might think in terms of opportunity cost and risk-reward. Through their disciplines, each of these people sees part of the situation, the part of the world that makes sense to them. None of them, however, see the entire situation unless they are thinking in a multidisciplinary way. In short, they have blind spots. Big blind spots. And they are not aware of their blind spots. There is an old adage that encapsulates this: 'To the man with only a hammer, everything starts looking like a nail.' But, not every problem is a nail. The world is full of complications and interconnections that can only be explained through an understanding of multiple models.

"The world is full of complications and interconnections that can only be explained through an understanding of multiple models."

Removing blind spots means thinking through the problem using different lenses or models. When we do this the blind spots slowly go away, and we gain an understanding of the problem.

Here's another way to look at it: think of a forest. When a botanist looks at it, they may focus on the ecosystem, an environmentalist sees the impact of climate change, a forestry engineer the state of the tree growth, a business person the value of the land. None are wrong, but neither are any of them able to describe the full scope of the forest. Sharing knowledge, or learning the basics of the other disciplines, would lead to a more well-rounded understanding that would allow for better initial decisions about managing the forest.

Expanding your Latticework of Mental Models

A latticework is an excellent way to conceptualize mental models because it demonstrates the reality and value of interconnecting knowledge. The world does not isolate itself into discrete disciplines. We only break it down that way because it makes it easier to study it. But once we learn something, we need to put it back into the complex system in which it occurs. We need to see where it connects to other bits of knowledge to build our understanding of the whole. This is the value of putting the knowledge contained in mental models into a latticework.

It reduces the blind spots that limit our view of not only the immediate problem, but the second and subsequent order effects of our potential solutions. Without a latticework of the Great Models, our decisions become harder, slower, and less creative. But by using a mental models approach, we can complement our specializations by being curious about how the rest of the world works.

"The better you understand, the better the potential actions you can take."

The more high-quality mental models you have in your mental toolbox, the more likely you will have the ones needed to understand the problem. And understanding is everything. The better you understand, the better the potential actions you can take. The better the potential actions, the fewer problems you'll encounter down the road. Better models make better decisions.

It takes time, but the benefits are enormous

Successful people file away a massive, but finite, amount of fundamental, established, essentially unchanging knowledge that can be used in evaluating the infinite number of unique scenarios which show up in the real world.

It is not just knowing the mental models that is important. First, you learn the models, but then you must use them. Each decision presents an opportunity to comb through your repertoire and try one out. This will slow you down at first, and you won't always choose the right models, but you will get better and more efficient at using mental models as time progresses.

You will not always get it right. Sometimes the model, or models, you choose will not necessarily be the best ones for that situation. That is okay. The more you use them, the more you will be able to build the knowledge of indicators that can trigger the use of the most appropriate model. Using and failing, as long as you acknowledge, reflect, and learn from it, is also how you build your repertoire.

"Sometimes the model, or models, you choose will not necessarily be the best ones for that situation. That is okay."

When you start to understand the world better, and the whys seem less mysterious, you gain confidence in how you navigate it. The successes will accrue. And more success means more time, less stress, and ultimately a more meaningful life.

Mental models in decision-making

Mental models help decision-making in many ways. Among other benefits, they can help you better understand the information you have, help you identify opportunities, and help you develop a plan of action.

Models are like lenses. When you use them to look at a situation, they help you see new information and new ways to process and integrate that information into your thinking. They are not causal explanations because life has more complexities than any one model can reveal. Models simply enlarge your perspective, giving you valuable insights to make better decisions.

Each example that follows uses a different mental model to better understand a historical situation. Starting with history is a great way to practice using models, and the insights you gain will help you better understand some of the dynamics of your own life.

Use Regression to the Mean to better understand the information you have

Failure or success is usually followed by a result closer to the mean, not the other extreme. Often we put so much pressure on ourselves to knock it out of the park all of the time that average results can seem like failures. But not every effort we make will produce rare and spectacular results. There is always an average.

Regression to the mean is a useful model for helping us put our averages into perspective. We have some influence over what our personal average is. We can work hard to get that mean comparatively high. But we will always have an average and cannot expect outlier success all the time. Appreciating the average is one way to consider the story of the Ford Edsel. Named after Henry Ford's son, it might well have been the most hyped product released of the 1950s. It's considered one of the biggest product fails of all time, but using the lens of regression to the mean, we can appreciate that the Edsel is better understood as closer to the average.

While everyone knew about the Edsel before its release; no one knew what it looked like. Ford preceded its release with a lavish two-year advertising campaign. Its name was everywhere, but none of the adverts depicted the car itself.[1] Aiming to build anticipation by shrouding the vehicle in mystery, they only showed small details or unrelated images accompanied by bold claims.

Ford made big promises about the Edsel. They said it was to be the greatest car ever made. Cars were a huge deal for Americans in the 1950s. In the post-war era, owning one went from being a luxury to something attainable for the average person. Mainstream car ownership changed the landscape of America with the construction of motorways and surrounding infrastructure like gas stations and motels. People took pride in their vehicles, viewing them as the linchpin of a new form of freedom and prosperity. So the Edsel captured their imagination, and the notion of it being something revolutionary seemed plausible. If cars had already changed the country, why couldn't a new car model prove transformative again?

Millions were spent on the Edsel's advertising. Ford's initial idea was to make a strategic move into the new market for medium-priced cars, which their main competitors dominated at the time. Following the wild success of the Ford Thunderbird a couple of years earlier, Ford management was confident they couldn't fail with the Edsel. If the Thunderbird had sold so well, surely the Edsel could only sell better with a bigger advertising budget.[2] They already had the brand name and the trust of consumers.

There was a queue at local showrooms to see the Edsel. As soon as eyes fell on it, a realization rippled across America: the Edsel was just a car. It was not a particularly attractive one at that. Its huge, vertical front grille looked odd and distorted, like a grimacing mouth.[3] The excitement bubble popped. Americans viewed the Edsel as a disappointment and sales were dramatically lower than expected.

Part of the problem was that the Edsel was so overhyped that it could only ever fall short. The advertising drummed up so much excitement, it was impossible for the car to meet expectations. In addition, early vehicles had some technical issues that, though minor, tarnished its image. When Ford did not manage to invent something truly revolutionary, it settled for marketing the Edsel as something it was not.

"The advertising drummed up so much excitement, it was impossible for the car to meet expectations."

Within two years, Ford stopped selling the Edsel.[4] Some—possibly exaggerated—estimates put the total losses at $2 billion in today's money. Ford had tried to make the car more desirable than it was through advertising. In the end, they made it less desirable. Thomas E. Bonsall, writing in Disaster in Dearborn: The Story of the Edsel, writes: 'People are mesmerized by the mighty brought low…The Titanic became a modern morality play. Man has reached too far, gotten too arrogant, and had, inevitably, been given a comeuppance. So it was with the Edsel.'[5] People revelled in the schadenfreude of seeing Ford fail at last.

Many car models have failed over the decades, often in an even more spectacular fashion than the Edsel. Yet it remains the most famous car failure of all. The story of the Edsel is complicated. There was not one reason for its failure. There is no doubt that the pre-release hype caused consumer expectations to be high. And the higher expectations are, the harder it is to fill them. But there were also issues within the Ford Motor Company during the development of the Edsel that led to poor decision-making.

One way to understand the enduring fascination with the story of the Edsel is through the lens of regression to the mean. Businesses are under constant pressure to have every release achieve a new level of success. But sometimes new products are just average. Ford had spectacular success with the Thunderbird before the Edsel and the Mustang after it. When judged against those vehicles, the Edsel seems like a massive failure. It was not really though. It ran okay. Some people liked it. It was just an average car useful for a mother taking her kids to baseball practice or an insurance salesman headed to work.

When you look at the spectrum of cars produced by Ford over time, some sold amazingly, and others hardly registered, with everything else falling in the range in between. The more cars the company releases, the more statistically likely that some will be average sellers. The problem for the Edsel was that the investment made in marketing suggested brilliance but the product was only average. The disappointment was in the contrast. People were expecting another outlier success from Ford, but we all have to regress to our mean at some point.

Use Inversion to develop a plan of action

Inversion is a powerful tool to improve your decision-making because it helps you identify and remove obstacles to success when developing your plan of action. The root of inversion is 'invert,' which means to upend or turn upside down. As a thinking tool, it means approaching a situation from the opposite end of the natural starting point. Most of us tend to think one way about a problem: forward. Inversion allows us to flip the problem around and think backwards. Sometimes it is best to start at the beginning, at other times it can be more useful to start at the end.

In the 1920s, the American Tobacco Company wanted to sell more of their Lucky Strike cigarettes to women. Men were smoking, but women were not. There were pervasive taboos against women smoking—it was seen as a man's activity. Women, therefore, presented an untapped market that had the potential of providing huge revenue. The head of the company thought that they needed to convince women that smoking would make them thinner, riding on the slimness trend that had already begun at the time. The head of the company hired Edward Bernays, who came up with a truly revolutionary marketing campaign.[6]

In an inversion approach, Bernays did not ask, 'how do I sell more cigarettes to women?' Instead, he went to the end and worked backwards. He wondered: if women bought and smoked cigarettes, what else would have to be true? What would have to change in the world to make smoking desirable to women and socially acceptable? Then—a step further further—once he knew what needed to change, how would he achieve that?

To tackle the idea of smoking as a slimming aid, he mounted a large anti-sweets campaign. After dinner, it was about cigarettes, not dessert. Cigarettes were slimming, while desserts would ruin one's figure. But Bernays took the model of Inversion even further. Not content with adverts to convince women to stay slim by smoking cigarettes; 'instead, he sought nothing less than to reshape American society and culture' (Axelrod, 2008).

Bernays solicited journalists and photographers to promote the virtues of being slim. He sought testimonials from doctors about the health value of smoking after a meal. Additionally, Axelrod claims, he combined this approach with altering the very environment, striving to create a world in which the cigarette was ubiquitous. He mounted a campaign to persuade hotels and restaurants to add cigarettes to dessert-list menus (2016).

This resulted in a complete shift in the consumption habits of American women, reorganizing society to make cigarettes an inescapable part of the American woman's daily experience.

Bernays's efforts to make smoking in public socially acceptable had equally startling results. He linked cigarette smoking with women's emancipation. To smoke, he claimed, was to be free. Cigarettes were marketed as 'torches of freedom.' He orchestrated public events, including an infamous parade on Easter Sunday in 1929, which featured women smoking as they walked in the parade. He left no detail unattended, so public perception of smoking was changed almost overnight. He both normalized it and made it desirable in one swoop.

The campaign also used other mental models to achieve its aims, but it was the original decision to invert the approach that provided the framework from which the campaign was created and executed. Bernays didn't focus on how to sell more cigarettes to women within the existing social structure. Sales would have undoubtedly been a lot more limited. Instead, he thought about what the world would look like if women smoked often and anywhere, and then set about trying to make that world a reality.

Use Cooperation to identify opportunities

We commonly think of biological cooperation as a win-win arrangement for the parties involved. Cooperation significantly expands what is possible by creating emergent properties that have more power than is suggested by the capabilities of the individual components. Often, however, we are so focused on what the competition or the adversary is doing that we forget to look for opportunities for cooperation.

There is possibly no better example of the power of cooperation to transform existing structures and create new capabilities than the relationships required to achieve success as a symphony orchestra. The interaction between the musicians and the conductor involves deep trust and commitment to produce something greater than the sum of its parts.

Alexander Shelley, conductor of the National Arts Centre Orchestra in Ottawa, Canada, describes the interaction of its members as such: 'In the best-case scenario, they start to behave like a flock of birds. When you see a flock of birds moving around, you're not quite sure who's leading it or what's happening.'[7] Such a metaphor speaks to the remarkable level of collaboration happening in symphony orchestras. It's not a leader with a bunch of followers, nor is it a rigid hierarchy of responsibility. Shelley says, 'When it's functioning correctly, it's a symbiosis between me and the eighty musicians on stage' (Parrish, 2016).

Why does an orchestra pursue its goals in this way? Because this symbiosis is what all the participants believe is required to truly make the symphony. Perfect cooperation is the difference between good and inspirational.

Trust is an essential component of successful symphony orchestras. Each musician hears the instruments closest to them best, and in some halls, cannot rely on their ears at all if they have to collaborate with an instrument in a different section. To cooperate fully as a group they have to trust each other and understand how their individual part contributes to what the rest of the orchestra is doing. In Music as Alchemy, Tom Service describes the musicians in the Berlin Philharmonic Orchestra as 'a group of players who value themselves enormously as individual musicians, but who together create an instantly identifiable single sonic body in their performances.'[8] Complete cooperation allows the emergence of the musical experience.

"Trust is an essential component of successful symphony orchestras."

An orchestra has to come together on many levels in order to make music. To achieve the trust required to anticipate the needs of the performance, the cooperation must be absolute. Each member has to be fully invested.

A remarkable example of this cooperation and trust is the Montreal Women's Symphony Orchestra. Established in 1940, they were 'the only complete all women's symphony orchestra in North America at that time—conducted by a woman, managed by women, and composed of women.'[9] This orchestra was born at a time when it was rare for women to play in orchestras, and if they did, were confined to certain instruments that were considered 'ladylike', such as the harp. Anything happening in the public sphere, even music, was still very much considered the purview of men. Of course, not everyone agreed. Two women, Madge Bowen and Ethel Stark decided that there was enough untapped female talent in the city of Montreal to put together an all-female symphony orchestra.

Initially, the only requirement to join the orchestra was commitment and passion. Thus, the orchestra was comprised of women from many walks of life— professional musicians and amateurs, homemakers, socialites, working-class, and upper class. There were Jewish women, Christians, French, English, and white and black women, including Violet Grant, the first black Canadian to be a permanent member of a symphony. Under the guidance of their conductor Ethel Stark, their emphasis was on teamwork and inclusiveness, so that 'despite their differences, they came together for one purpose: to make music' (Rachwal, 2015).

The group's diversity required a staggering amount of cooperation to make the orchestra succeed. They had to deal with social tensions, some of which are still unresolved in contemporary society. Before the instruments could cooperate to make music, the cooperation of the members was required to create the orchestra. Class divisions had to be set aside during rehearsal time for their dedication to the music to come to fruition.

Cooperation often comes about in a biological context due to the latent understanding that no one can do everything. No species or individual is perfectly adapted to deal with the entire spectrum of possible environmental conditions. This applies equally well to an orchestra. There is no music without all the instruments, and these instruments cannot work together without people who are willing to trust each other to respond correctly to the demands of performance.

The Montreal Women's Symphony Orchestra devoted themselves to their music, demonstrating, as Maria Noriega Rachwal describes in her biography of the group, 'the power of music to transcend boundaries' (2015). Their dedication and talent were finally recognized after years of practice in basements and drafty industrial buildings, squeezing the music in between factory work and child-rearing, when the group became the first Canadian orchestra to be invited to play at Carnegie Hall in New York. The performance was exceptional; the music flowed out to rave reviews. Building on this success, the orchestra toured all over the world and performed on television and radio. Never well-paid, the Montreal Women's Symphony Orchestra eventually had to shut down after being denied funding that was made available to other Canadian symphony orchestras (Rachwal, 2015). It was truly their commitment to music and each other that led these women to the successes they had. In terms of cooperation, theirs was absolute. The women in the orchestra were all in.

Conclusion

We can therefore see that mental models are powerful tools that shape the way people make judgements and decisions. When we use inaccurate models those judgements and decisions are likely to miss the mark. Using deliberately constructed, accurate mental models improves your chances of making good decisions. Using a model like Regression to the Mean helps you evaluate if something is truly a success or failure. Sometimes, using a mental model like Inversion reshapes the world to fit new narratives we tell about health and freedom (whether or not they are borne out by longer-term health data). By having a model of Cooperation, it might be possible to carry out astonishing feats of collaborative excellence in the absence of the usual expected structures.

By exploring other mental models, teams are able to see their challenges from multiple perspectives, stress-test their responses, or come up with novel solutions. These three mental models are only a small sample of over seventy mental models we explore in the Great Mental Models book series, illustrated with examples from all over the world to improve decision-making. Yet mental models are most effective when they are put together into a latticework, combining models and deep disciplinary expertise so the engineer, psychologist and business teams are able to combine their ways of looking at the world to make the strongest possible decisions.

Further reading

The stories in this article are excerpts from the Great Mental Models book series. Farnam Street is also releasing a course in 2022 to teach you how to build your own latticework of mental models. Find out more at fs.blog

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Making Decisions Led by Principles: A Strategic Approach

By David Serabian

'Leadership is nothing more than knowing what to do, and doing it,'' former White House Chief of Staff, James A. Baker III once said.[1] However, this begs a question: how do you get to the point of knowing what to do? When rules and policies do not apply to a situation, what do you do? When there is a crisis and things are not clear, what is to be done? When there is a hard choice to be made because we are in a grey area, how do we weigh the options and make a decision?

This article aims to offer a tool for creating context, clarity, and speeding up decision-making when the correct decision is unclear or difficult. By looking to our principles, weighing them, and determining in which order to look at them, we can gain clarity to make decisions.

Often in situations where a hard choice must be made, leaders and chiefs of staff are both short on time, with conflicting advice and input, and whatever is decided will have significant implications. If the decision is made by the leader of the organization and there is no higher authority that can be called upon or is able to make the decision, then the role of chief of staff becomes an essential sounding board and advisor, providing context and alternative views. Sometimes, the chief of staff is thrust into that decision-making position themselves.

A chief of staff once said, 'You have to constantly ground everyone–even your executive—in the overall goals of what you're trying to accomplish. People lose sight of that.' A chief of staff must be able to say, 'I see what you're trying to do, but I'm concerned because of the potential impact'. After all, 'if content is king, context is a god'.[2] As chiefs of staff, we provide context to both our leaders and the organization, which we can also do by weighing principles.

Three example scenarios help us to understand the framework for weighing principles, and see how it can be put into practice.

- Legal philosopher Ronald Dworkin's article 'The Model of Rules', and the case of *Riggs v. Palmer* establish the underlying theoretical framework and apply it to a legal situation.
- A scene from the film *Crimson Tide* demonstrates the opposing perspectives on decision-making where the situation is unclear, and reflects the dynamic between a chief of staff and their superior.
- The 1982 Tylenol murders, in contrast, demonstrates an example where the principles are clearly defined and clearly weighted.

The framework is subsequently applied to various organizations and roles that chiefs of staff engage in regarding decisions that impact people and constituents.

Previously, Dworkin's framework does not appear to have ever been used or applied outside of the realm of legal theory. Using fictional examples from novels and films can vividly illustrate situations, and invite us to imagine ourselves in those circumstances.

Understanding principles and how to weigh them: 'The Model of Rules' and Riggs vs Palmer

"Rules are not necessarily sacred; principles are."
—President Franklin Delano Roosevelt[3]

The legal philosopher Robert Dworkin, in his article *The Model of Rules*, critiques H.L.A. Hart and began the famous and years-long Hart-Dworkin debate. The discussion argues that judges are not bound to make decisions only on the rule of law in the common law Anglo-American legal system, but also upon existing social 'principles' to make decisions in hard cases. As Dworkin put it,

We make a case for a principle, and for its weight, by appealing to an amalgam of practice and other principles in which the implications of legislative and judicial history figure along with appeals to community practices and understandings. There is no litmus paper for testing the soundness of such a case—it is a matter of judgment, and reasonable men may disagree.[4]

Dworkin proposes his model for judges whose job it is to make decisions while weighing evidence; for difficult cases, not ones that are easy; and to be flexible to the underlying principles of a culture.

A rule, as Dworkin puts it, is a 'standard of behaviour that has a call on its subject beyond the threat that may enforce it' (20). The person giving the rule has to have authority to issue it, for the rule to constitute a legitimate command. For example, imagine you are working for a company and your superior tells you that you cannot issue a refund for a product without a receipt. The superior has the authority to give such a command and it directs a result: no receipt, no refund (Dworkin, 20, 36).

Rules are also all or nothing affairs unless exceptions are explicitly stated (Dworkin, 25). Either the rule applies or it does not. If you drive over the speed limit, you can get a traffic ticket. The rule of yielding to a stop sign does not apply to speeding. Now, some rules are clearly more important than others because of the effect they have (Dworkin, 27). In a football (soccer) game the rule of when a penalty kick occurs is more important than the number of players a club is allowed to have as it influences winning and losing much more than having plus or minus one player on the bench. Rules also cannot conflict. 'If two rules conflict, one of them cannot be a valid rule. The decision as to which is valid, and which must be abandoned or recast, must be made by appealing to considerations beyond the rules themselves,' Dworkin stated (27).

For Dworkin, policy refers to 'that kind of standard that sets out a goal to be reached, generally an improvement in some economic, political, or social situation deemed desirable' (23). A policy is distinct from a principle, for example, 'the standard that automobile accidents are to be decreased is a policy, and the standard that no man may profit by his own wrong a principle' (23). A policy is also distinct from a rule. Stating that there can be no returns without a receipt is a rule, it is binding. Stating that supervisors should do their best to retain top-performing employees is a policy, at least in this sense.

Dworkin refers to 'principle' in a broad sense, 'to the whole set of those standards other than rules' (22–23). Principles are however more complicated. For one, a principle points you in a particular direction to make a decision, but it is not absolute and it survives even if it is not applied (36). Principles also are not defined with specificity as to what they entail (27). The principle that 'a superior takes care of their subordinates', does not define what 'taking care of' means. However, we can work it out by using similar legal principles. For example, the principle that car manufacturers have a special duty to make a safe product was applied in the 1960 state of New Jersey court case of Henningsen v. Bloomfield Motors, Inc. regarding defective parts, because if a part is defective, people may suffer injury or death (Dworkin, 24).

"A policy is distinct from a principle."

Similarly, a concept like 'the customer is always right' is not a policy, nor a rule, but a principle. If a company has a policy to increase customer satisfaction, then that is a policy. The company may have a rule to state an item cannot be returned without a receipt. If a customer attempts to return an item without a receipt, then clearly the customer is not correct and a refund will not be given. However, their principle of 'the customer is always right' stays intact.

In a contrasting example, the same company may not have a rule against sometimes accepting an expired coupon. So the policy of attaining the highest customer satisfaction at the store, and the principle of 'the customer is always right' would mean that honouring a customer's expired coupon fits in with that policy and the principle. The company might also have a principle of maximizing profits, which still survives even when that expired coupon is honoured. In that case, the principle of 'the customer is always right' was weighed as being more important than maximizing profits.

To illustrate this conflict of weighing principles, Dworkin cites the famous 1889 New York state case of *Riggs v Palmer*. In brief, a grandson knew he was going to inherit money when his grandfather died. The grandson expedited the process of getting his inheritance by poisoning and killing his grandfather. The case of Riggs was to determine if the grandson (after being convicted for murder) would still get his inheritance.[5] After all, he was still in the will. The will was also legally valid with all the necessary rules followed. There were no rules, no laws, and no policies to address this kind of case. And yet it clearly seems wrong that someone should be rewarded for murdering their relatives. Therefore, how does one decide this case that is clearly in the grey area?

"There were no rules, no laws, and no policies to address this kind of case. And yet it clearly seems wrong that someone should be rewarded for murdering their relatives."

Should contract law be enforced? The rules are the rules after all. Law and order must be maintained. The laws/rules clearly indicate the decision. The court itself stated, '[I]t is quite true that statutes regulating the making, proof and effect of wills, and the devolution of property, if literally construed, and if their force and effect can in no way and under no circumstances be controlled or modified, give this property to the murderer' (*Riggs v. Palmer*).

Yet, this seems wrong according to the norms or principles of law and society. Can a murderer get the money he killed his own family for? Certainly a shocking proposition. The court ultimately decided that he would not get his inheritance. Specifically, all laws as well as all contracts may be controlled in their operation and effect by general, fundamental maxims of the common law. No one shall be permitted to profit by his own fraud, or to take advantage of his own wrong, or to found any claim upon his own iniquity, or to acquire property by his own crime (*Riggs v. Palmer*).

The weight of these principles (honouring contracts versus no man being able to profit from his wrong) were weighed and the latter prevailed.

In many situations, though, we do not have the convenience of time to make a decision as judges do. Nor are we given in life the simplicity of two decisions to choose from, siding with the prosecution or the defence. Nor can we list all of the principles that there could be in advance because 'they are controversial, their weight is all important, they are numberless, and they shift and change so fast that the start of our list would be obsolete before we reached the middle' (Dworkin, 45). Therefore you have to look at which are important to your organization, and which apply to the situation, as we will see in the fictional film example, *Crimson Tide* (1995).

Weighing Principles in *Crimson Tide*

While a film like *Crimson Tide* is still less complex than our real world experience, it provides a comprehensible example that has more than just two principles in play, and where decisions need to be made fast, without the time for careful and judicial deliberation.

The Executive Officer, Lieutenant Commander Hunter, played by Denzel Washington, had been assigned to the *USS Alabama*, an American nuclear armed submarine under the command of Captain Ramsey, played by Gene Hackman, only days before the story begins.[6] An Executive Officer is the second in command and shares some duties with a chief of staff such as executing special tasks, ensuring orders are carried out, and knowing and communicating the concerns of the crew (Parris, 107, 109). Captain Ramsey is nearing retirement age, and one of the few submariners with combat experience, known for being one to execute orders without asking why. Hunter attended the Naval Academy and studied at Harvard, and portrayed as being more philosophical and more likely to question orders (*Crimson Tide*). *Crimson Tide* is set in 1995, as the submarine is dispatched to the Pacific Ocean in response to a Russian ultranationalist named Radchenko, who has recruited members of the Russian military and taken over a nuclear missile base. The Alabama is tasked with launching their nuclear missiles to destroy the base if Radchenko begins to fuel his missiles in preparation for a launch. These stakes are high, but it is the difference in decision-making principles that provides much of the drama of the film.

A complex set of conflicting crises arise at once. In a pivotal scene, an accidental fire breaks out in the galley (kitchen), Hunter leads the fire-fighting effort and brings the flames under control, but some of the men are injured. Immediately afterwards, the captain orders a missile launch drill. Hunter questions his captain as to whether this is the best time to run a drill, in front of the crew. Then the infirmary sends news that a sailor who fought the fire was entering cardiac arrest. The captain calls off the drill. Both the captain and executive officer rush to the infirmary in time to witness the sailor's death.

"It is the difference in decision-making principles that provides much of the drama of the film."

Just after they have left the infirmary, the captain and executive officer meet in the Ramsey's quarters to discuss their disagreement.

This scene illustrates three often-cited military principles:

- 'Mission first and people always', completing and being prepared for the mission while also needing to balance taking care of your personnel.
- 'It wasn't what you did but how you did it'. Doing the right thing in the wrong way makes it wrong.
- Making sure the chain of command is respected and there is unity in the leadership.

The captain questions his executive officer about his thinking when he challenged his superior officer. Hunter's thinking is that it is best to ensure the fire was fully out and all the staff were safe before running a drill, but Ramsey disagrees.

> I tend to think that's the best time to run a drill. Confusion on the ship is nothing to fear. It should be taken advantage of. Lest you forget, Mr. Hunter, we are a ship of war, designed for battle. You don't just fight battles when everything is hunky-dory.[7]

The executive officer wants to put the people of the vessel first, whereas the captain wants to put the mission first. They are both right and the two-part principle of 'mission first and people always' survives after this encounter. They are both correct. Both attending to the fire and preparedness despite confusion are important and reasonable. A fire on board a submarine is very serious because it could potentially lead to a total loss of the crew and vessel. Yet, being able to act appropriately in confusion and execute a high stakes mission is also of the utmost importance. As Dworkin wrote, 'reasonable men may disagree' but the principle remains (37).

"They are both right."

The dynamic nature of a principle is also demonstrated when the captain suspended the drill once he was informed of the sailor's heart attack. The drill was less important once a subordinate entered a life-threatening state. The weight of those principles (mission vs. people) shifted once that new information came into play.

Next Ramsey addresses the issue of whether Hunter did the wrong thing, or did something in the wrong way.

> I don't have any problems with questions or doubts. As I said to you before, I'm not seeking the company of [sycophants]. When you got something to say to me, you say it in private. And if privacy doesn't permit itself, then you bite your [expletive] tongue (*Crimson Tide*, 1995).

The problem was not about Hunter giving his insights, nor that he expressed questions or doubts, the issue was how the executive officer did it: it was done in public and not private. By doing it publicly it created doubt in the chain of command. However, in a crisis situation, there might not be an opportunity to speak in private, and so the principle of the requirement to bring up accurate critical information about the ongoing issues around the fire may have to be weighed against the principle of acting with decorum. Once again, both of them are right.

Finally, Ramsey sets out the principle of the chain of command, and explains why he thinks it was paramount in that moment.

> Those sailors out there are just boys. Boys who are training to do a terrible and unthinkable thing, and if that ever occurs, the only reassurance they'll have that they're doing the proper thing is gonna derive from their unqualified belief in the unified chain of command. That means we don't question each other's motives in front of the crew. It means we don't undermine each other. It means in a missile drill they hear your voice right after mine, without hesitation (*Crimson Tide*, 1995).

In the case of nuclear missiles, the executive officer, by rule with no exception, must verify every captain's order for a nuclear launch, an essential security step when dealing with the most destructive weapons humans have ever created. The crew need to be able to trust their officers when they are given the order to launch nuclear missiles, and this is achieved through a unified chain of command. If the pre-emptive strike to eliminate Radchenko's missiles as they are about to be launched were to be delayed due to a lack of unity, millions of lives could be lost and a nuclear war could break out. But, as in the case of the timing of the drill, there are judgment calls, and a good second-in-command will also need to be sure that their principal is acting with all the best information and most strategic timing. Neither person is wrong, but as this is a military drama they come to agree that the chain of command is pre-eminent.

"A good second-in-command will also need to be sure that their principal is acting with all the best information."

To further clarify the military principle of 'mission first and people always' with its order of operations is a quote from one of Eric Nylund's novels. In this excerpt, Chief Petty Officer Mendez (a highly experienced veteran and senior non-commissioned officer) is speaking to John (a young squad leader) who has just lost some of the personnel under him.

> 'A leader must be ready to send the soldiers under his command to their deaths … You do this because your duty to the UNSC supersedes your duty to yourself or even your crew.'
> John looked away from the view screen. He couldn't look at the emptiness anymore. He didn't want to think of his teammates—friends who were like brothers and sister to him—forever lost.
> 'It is acceptable', Mendez said, 'to spend their lives if necessary … It is not acceptable, however to waste those lives. Do you understand the difference?'[8]

In the military, it is one's duty to spend—if necessary—but not waste, the lives of one's co-workers and subordinates to achieve one's mission. John cared for his subordinates, they were like family, but carrying out the mission is still more important. Upon that, chiefs of staff taking care of their personnel (including advocating for them) takes on considerable weight as service members will be asked to carry out orders. Orders that a chief of staff may have helped craft, carry out, or advised for or against. There is a balance though, acknowledging lives must be spent does not mean they should be spent recklessly or flippantly.

The film writers created a situation and characters who could act out conflicting principles in a moment of crisis, with little time to deliberate, and extremely high stakes. It might seem that transferring principles from a legal theory or a film/novel to the real world would make things even more complicated. However, in the next example, we see that having a principle made an impossible decision faster and more straightforward.

Tylenol: 'we had something more valuable than a crisis plan'

In 1982, seven people died in the Chicago area after taking Tylenol (paracetamol/acetaminophen) that had been laced with cyanide. It was a shocking crime, and to this day the perpetrator has never been found. The manufacturers of Tylenol, Johnson & Johnson and their subsidiary McNeil Labs, took the radical decision to pull all Tylenol from the shelves across the country and warn consumers. They then produced new safety mechanisms, such as the tamper-proof seals on the top of bottles.[9]

In a presentation to the GIBS Business School at the University of Pretoria, the then leader of the Johnson & Johnson team, Alan Hilburg, recalled what happened during the crisis. In the situation, the principles set out above in the section 'Understanding principles and how to weigh them', of protecting the customer from harm, and the principle of maximising profits. We also see the principle of a united chain of command, this time in a corporate setting.

Hilburg recalls being telephoned by the brand manager to inform him that 'someone is sick or has died as a result of taking Tylenol' from one of the stores in Chicago.[10] The brand manager recommended recalling all the product from that store. Hilburg proposed removing the product from 'all the stores in Chicago' under a precautionary principle that the issue might be more widespread (Hilburg, 2014). That seemed 'crazy' to the brand manager, an over-reaction that would jeopardise the principle of maximising profits (Hilburg, 2014). But it was also important to protect customers.

To make such a significant decision, they needed to include more senior decision-makers. The team spoke to the president of McNeil Labs, who believed that the principle of protecting customers had more weight, and so all the Tylenol in Chicago should be recalled. During the meeting, however, Hilburg asked the question 'Well are we sure that it's only Chicago?' The question meant that they needed to go right to the top, to the chairman of Johnson & Johnson who agreed that it was too risky to allow other people to potentially get sick or die. 330 million tablets were recalled across the United States of America.

Hilburg reflects:

You know, we didn't have a crisis plan. … this is the real story. We didn't have a crisis plan, but quite frankly we had something more valuable than a crisis plan. We had their credo and the credo became our crisis plan. Just like your value statement could become your crisis plan (2014).

Johnson & Johnson's credo is that their responsibility is first 'to the patients, doctors and nurses, to mothers and fathers and all others who use our products and services'. Johnson & Johnson's next responsibilities are to employees, then communities, and lastly to shareholders.[11] The credo is engraved in an eight-foot (2.43 metre) block of stone in the lobby of the company's headquarters, literally giving weight to their principles.[12]

Hilburg claims that 'If you execute your values, you're not going to make a mistake,' showing the value of using principles to make difficult decisions in a time of crisis. Because they had already identified how they would weigh competing principles, they were able to execute a strategy in only thirty-six hours. The first principle was to protect the users of the product, so the product had to be recalled. Employees, and the communities in which their employees lived, would also be negatively affected by these dangerous bottles of pills, so Hilburg did not see a conflict between principles there (2014). Because the responsibility to shareholders came last, the principle of maximising profit clearly weighed less, making the decision-making 'easy' and extremely fast.

"Because they had already identified how they would weigh competing principles, they were able to execute a strategy in only thirty-six hours."

However, pulling the product off the shelves was only the first step. Tylenol was an important medication for many people, and an important part of the company's line of products, with 34–35% market share. The next step was to rebuild their market share while still focusing on their principles. By acting with integrity, the company demonstrated that they could be trusted. They then redesigned both the pill and the packaging. Moving from a capsule, which could be unscrewed, poison added, and then returned to the bottle was dangerous, and so they instead sold the products as a solid caplet. However that also was not enough, as somebody could still dip the pill in poison. They also changed the packaging, with a plastic seal around the top of the bottle, so the user knew if anyone else had opened the bottle before them. 'The responsibility the company had and the marketing strategy which was not about the efficacy of the caplet, it was about talking about the packaging', Hilburg went on, and that was rewarded as the company 'went from 34 to 46% market share in 90 days as soon as we reintroduced the new packaging (2014).

However, even though the principles were laid out in the credo, and there was an order of operations to the credo, with the weight of each listed from most to least important: coming to these conclusions is not easy. Even in one of the best crisis management and business case studies in history, there was debate among the employees of Johnson & Johnson. There was a lack of clarity on what to do. There was a time limit in which more people could die as cyanide-laced pills were found at other stores (Markel, 2014). It was messy.

Even after the medication had been pulled, it was still unclear what to do. Such safety solutions had never been introduced before. The principle that was broken in the public's eyes was safety. The point of restoring trust with better packaging was that there was a responsibility, a principle, to reassure users that Johnson & Johnson would never let this happen again. The seal on the bottle not only protected users from tampering, but enabled users to double-check that the bottle had not been tampered with (Hilburg, 2014).

In each of our examples, there has been an official set of rules: the letter of the law, the chain of command, or a credo on an eight-foot stone plaque. There have also been procedures: court process, the verification of nuclear launch commands, or the order of weight for the credo. But in each example, the most important aspect of decision-making was the principle: that no one should benefit from murder, the balance of 'mission first and people always', or that a medical company should be trusted to heal and not harm its users. Acting in line with the principle is the best strategy for creating context, clarity, and speeding up decision-making when the correct decision is unclear or difficult. By looking to their principles, weighing them, and determining in which order to look at them, they gained clarity to make decisions.

How this can apply to you

Chiefs of staff working in businesses, non-profits, and politics can also use these strategies to make decisions—as noted above the military has already been addressed. We can also identify what principles organisations hold by seeing how they make decisions, particularly in times of crisis.

For example, the principle of which people were more important can be exercised. Each of the following types of companies placed certain personnel first and showed which people were more important.

For example, a tech start-up offers new or disruptive creative products to the market, so they might highly value employees and give them significant stock in a company that will make them rich if the company succeeds. Whereas a large company whose competitive advantage is offering low-priced goods for customers, even just by just a few cents more than their competition, might value their margins more than their employees.[13]

Some business leaders in hard times commit to no layoffs, instead cutting their salaries.[14] Other companies during hard times may lay off lower-level employees while still paying their executives' bonuses and have good shareholder dividends.

With non-profit organizations, the priority is the cause. If the cause is caring for the homeless or the environment, then that comes before personnel. A non-profit may treat its employees well, but their priorities are always to the cause. Non-profits do not necessarily prioritize paying their employees well, and they heavily rely on donations and volunteers. As the cause is what is more important, a donation of $100,000 is more likely to go to feed the homeless than be given as an employee bonus. Fundraising can be a priority, but this still is in service of the cause.

Davidson, Oleszek, and Lee (2012) identify different principles that can guide political and legislative leaders:

1. Those for whom a particular set of issues (e.g. infrastructure or defence) becomes their speciality and they advance it to help those affected by it;

2. Serving their constituents ('constituency servant'), where helping constituents through advocacy, protection or benefits are their focus;

3. Following their party ideology ('Partisan') to enable them to pass legislation by making sure their party is in power.[15]

The principle that the particular politician follows will impact how they act, and how they weigh decisions.

Looking to principles during times when things are unclear can be immensely helpful. Figuring out what principles or values are most important and ordering them to create an order of operations can be very helpful too, as the Tylenol scenario exemplified. As shown, these principles will vary based upon the industry, organization, and situation. These principles are also not absolute, in that, just like rules, they sometimes do not apply. At other times the rules are not as important as principles are, as was seen in *Riggs*.

"Figuring out what principles or values are most important and ordering them to create an order of operations can be very helpful."

Looking at these principles for weight or order within an organization may require reconsidering which are important. If, for instance, loyalty and producing profits are considered the two most important principles, then it makes perfect sense to retain and protect a senior executive who engages in sexual misconduct with subordinates. However, increasingly, organisations are understanding that their priorities need to change, demonstrated by a PricewaterhouseCoopers report that found 'scandals over bad behaviour rather than poor financial performance was the leading cause of leadership dismissals among the world's 2,500 largest public companies' in 2019.[16]

Not every decision will come down to principles. This framework is meant to be a tool, and like any tool, there are some situations where this tool is not appropriate, It is not wise to use a scalpel to cut down a tree instead of a chainsaw, nor is it wise to use a cleaver to mince vegetables when a kitchen knife is available; even if in the case of the latter two they both could accomplish the same task. This tool is about encouraging chiefs of staff to use their judgment, not to suspend it.

"Looking at one's principles does not deliver specific directions and answers."

Looking at one's principles does not deliver specific directions and answers. However, it is immensely helpful in charting the general course. There may be shorter or longer-term factors that affect decision-making as well. A commandant of the US Army War College once said, 'There may not be a right answer to a problem. I would tell you at the strategic level there are rarely right answers. There are some that are more right than others, but they all have somewhat of drawbacks.'[17] The best solution is often far away from what would be perfect. Sometimes all we are left with is the principle of choosing the lesser of two evils.

Figuring out principles, their weight, and maybe even their order of operations, can help speed up decisions during complex times. This is especially the case if drills or scenarios can be practised to prepare your organization to ensure that hesitation and analysis paralysis are reduced during time-sensitive situations. Practising your principles can even help you recognize when the best thing to do is to wait for the right opportunity. Patience is essential; hesitation, hazardous.

Confusing times need not be as confusing if we are aware of our principles, weigh them, and use them with our best reason and judgment. No matter the industry or organization, this framework of reaching beyond the rules can be helpful. Principles will undoubtedly vary, but by using this framework as a tool we can help our organizations make better decisions.

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The Challenges of the Chief of Staff

By Eryn-Ashlei Bailey

For all that is uncertain about the Chief of Staff role, there are several universal challenges. A chief of staff faces these challenges at different times, and to varying degrees. As chief of staff, your role may be poorly understood. Your impact will vary depending on the team that you work with. Your team may never consider you as a peer. Deftly overcoming these challenges enacts the espoused values of your principal, and limits disruption to your principal's agenda…all in a day's work.

Depending on the size and structure of the organization, it can take between six to nine months to demonstrate the scope and function of the chief of staff role. After the scope and function of the chief of staff role is better understood, you can truly get to work. As you mature in the chief of staff role, you earn respect, and you have wider reach within an organization. As with all endeavors, begin with the end in mind. Ask yourself, 'What do I want my legacy to be?' Craft a wish list of three strategic and/or cultural impacts that you hope to associate with your time as chief of staff. Work closely with your principal to align on vision, objectives, and measures of success, to ensure that you're delivering on what's most important to your principal.

Ask yourself, *'What do I want my legacy to be?'*

A clear set of goals, established by your principal, can elucidate your mandate as chief of staff. When I started as a chief of staff, my mentor encouraged me to explain what my role 'is,' and what my role 'is not,' when people ask about what I do. Describing what you do, and setting boundaries on what you do not do, will differentiate the chief of staff role from other core functions. Clarity drives efficiency and increases impact. Seek clarity.

If you're motivated enough to seek a chief of staff role, you're likely seeking an opportunity to make an impact on your team, in your company, and even in your industry. The reality is that the chief of staff portfolio of projects can include several individual contributor projects, but will likely include projects completed by cross functional teams. Your ability to make change depends on the team that you work with. As teams vary, so will your impact vary also. Just starting a conversation may be your most important contribution to a project or strategic initiative. A smart chief of staff knows when to swoop into a project. An adroit chief of staff knows when to pull up, when to involve others, and when to move on to the next project.

"An adroit chief of staff knows when to pull up, when to involve others, and when to move on to the next project."

Power is given, not taken. Power will be given to you by your teammates after you've listened, learned, and shown a keen interest in advancing their success. There are three categories of people in every company. Category one people will immediately buy into your role and invite your input. Category two people will need more time than others to adjust to your role, and by proxy, to you. Category three people will resist you altogether. Focus on category one and category two people. Eventually, category three people will start to work more with you. A given percentage of people in any company will not work with you. In those cases, your focus should be on those who will work with you.

Perhaps one of the trickiest dynamics to navigate as a chief of staff is the peer dynamic. The peer dynamic has many facets. Questions like, 'Who are my peers,' and 'What do my peers expect from me and vice versa,' will arise. The answers to those questions are likely to shift and change over time. As chief of staff, one of your most valuable assets is your reputation as a trusted confidant. Managing perceptions of your personal brand is essential. Personal brand management is crucial to your credibility as chief of staff.

Once the perception of your role crystallizes, you will need to intentionally manage yourself with very acute self-awareness. Be authentic, but steer clear of venting to people in your organization. Your words hold weight. Be friendly, and when you form friendships, keep the friendship centered on non-work activities.

Despite your best efforts to come alongside your peers to solve problems, your team may never see you as a peer. The core of the chief of staff role is finding broken windows to fix. That mandate can cause your peers to 'close the shutters,' so to speak. The equipped chief of staff should be emotionally intelligent enough to discern those dynamics but must resolve not to be undone when they play out. The chief of staff must carry forward with the strong relationships that she's formed and execute on her principal's objectives. Forward march!

"Embrace the challenges. The rewards are so worth it."

These are a few of the challenges that a chief of staff will encounter. Identifying challenges, tapping into internal resources to overcome them, and seeing challenges through to breakthrough solutions, will be inherently rewarding. On the other side of challenge is triumph. In ideal situations, the other side of challenge is new found depth in work relationships that would not have existed otherwise. Embrace the challenges. The rewards are so worth it.

Eryn-Ashlei Bailey *is a Chief of Staff at a medtech company that is commercial in over 45 countries. She has worked as a Chief of Staff in the multi family office space as well. Eryn started a LinkedIn series about what the daily life of a Chief of Staff is like. She is based in the Boston area.*
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Read Eryn-Ashlei Bailey's other articles in her chief of staff series at https://www.linkedin.com/in/eryn-ashlei-bailey/recent-activity/posts/

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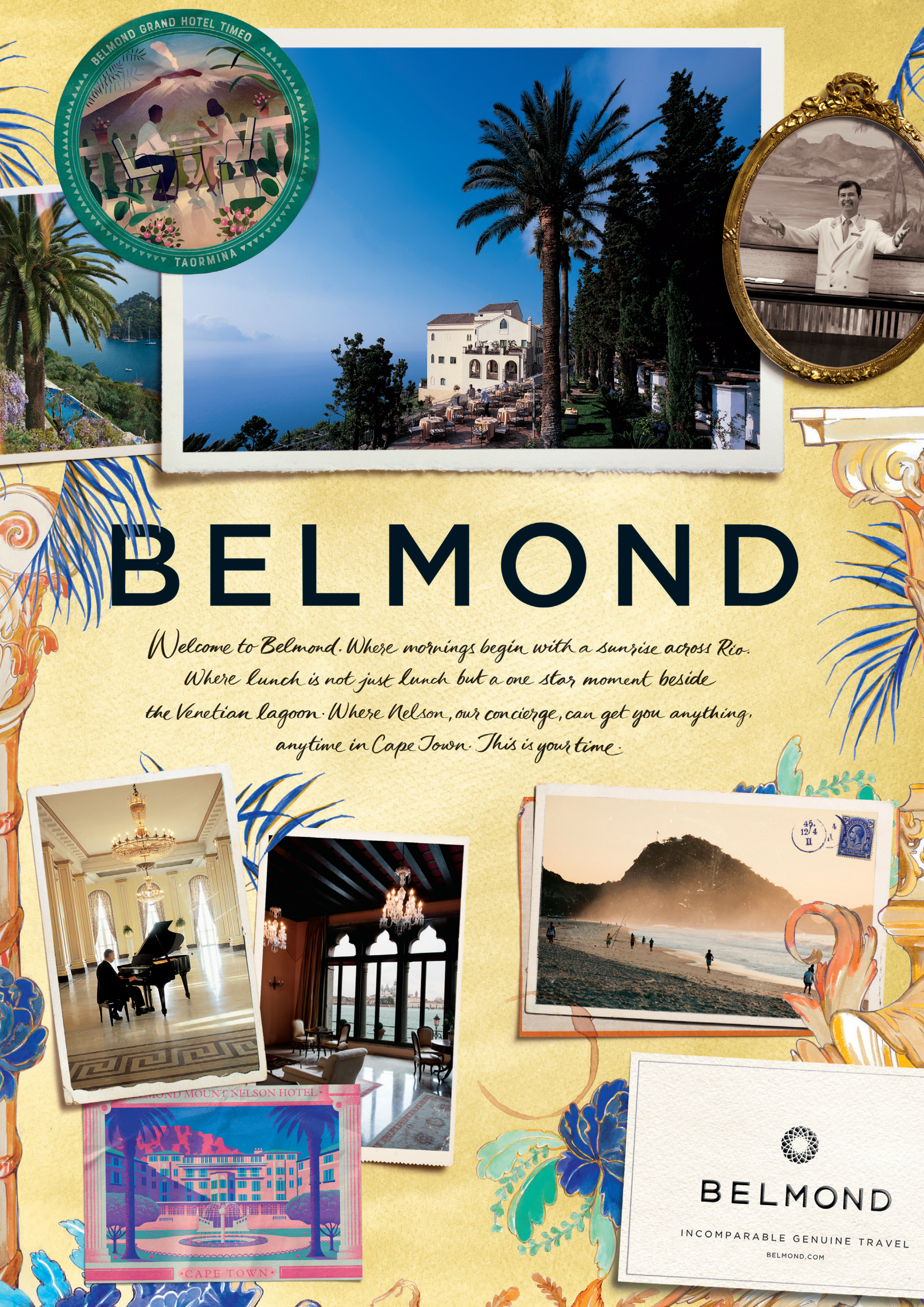

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