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Saïd Business School

# The Spacemaker

## How the chief of staff role is maturing and developing

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# Introduction

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When a chief of staff role is newly established, the postholder often navigates challenges that arise from the evolving and ambiguous nature of the position. Initially, much of their focus may be spent inward, defining their responsibilities, creating best practices, and aligning with leadership's vision.

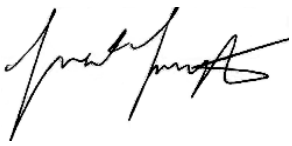
It is pleasing, therefore, that the five cohorts of chiefs of staff attending the Chief of Staff Executive Education programme at Saïd Business School, University of Oxford, have demonstrated a progressively broader perspective as the role has matured, even within this relatively short period. Participants are secure enough in their positions not to have to talk about them anymore, but rather to pay attention to what is happening in the world outside their organisations.

Early conversations about what the chief of staff does or how to respond to colleagues who challenge the legitimacy of the role have given way to deeper discussions about the distinctive contributions that the chief of staff can make to strategy, culture, and leadership within organisations as they navigate a complex and turbulent environment.

Chiefs of staff 'get stuff done'. They act as the connective tissue or lubricant within organisations: championing, facilitating and enabling others as well as delivering operationally. At the same time, they stand outside the mainstream management decision-making process and, where necessary, challenge it. Typically, this is not about being confrontational but about creating space for different perspectives, reflection, and new ideas – all vital for problem-solving, innovation, and future-thinking.

This of course is exactly what the Chief of Staff Executive Education programme at Oxford also does for our participants. In a packed week of cutting-edge research, provocative presentations, team discussions, and at least one entirely left-field interactive workshop, chiefs of staff from all sectors and across the globe took time out from their day-to-day activities to share experiences, listen to different views and enjoy thoughtful – and ultimately practical – conversations about leadership, transformation, and strategic alignment.

This report captures some of the fascinating and sometimes unexpected insights that these conversations generated. We are grateful, as always, to the programme director, Professor Jonathan Trevor, and his assembled team of academic and practitioner experts, as well as to the programme participants, whose thoughts, experiences, and ideas are conveyed in the anonymous quotes scattered throughout.



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# Looking outwards, preparing for uncertainty

**How much do I really do environment scanning? How much do I really think about sustainable business? How do those elements impact me, and then impact my role? How does that affect the organisation's leadership and who I really advise on those things? I'm questioning how I should go beyond my comfort zone and speak more broadly.**

We live in a fast-changing, complex and hyperconnected world. What happens 'over there' can have an impact 'over here', but the impacts are not necessarily immediate or direct. Crises are becoming more frequent and less contained. Different parts of the system are changing at different rates and in different directions, increasing friction just as cooperation is urgently needed in the face of the existential challenge of climate change and the potentially destabilising effect of developing AI.

Organisations have to operate within this system, but for many it is difficult to tear their attention away from operational matters and their immediate business ecosystem – their existing competitors, suppliers, customers, and regulators – and from the short-term demands of quarterly reporting, lean manufacturing techniques, and fast-changing customer demands.

Some participants suggested that this close focus is not just myopia but fear:

> *I think a lot of organisations are looking at climate change statistics and feeling disempowered and threatened. It's such a big thing, how can they do anything about it?*

In addition, as Trudi Lang's session on scenarios planning showed, we tend to cling to unconscious assumptions about what the future will be like, imagining it based on linear growth and the continuation of past trends. Individuals and organisations can be caught off-guard by the escalating speed of change, by competitors emerging from unexpected areas, or by trends that 'bend'.

Doing nothing is not an option. What is it that chiefs of staff can do?

## Use your antennae to pick up the weak signals.

Look at the clothes people are wearing; look at what they are consuming and how; spot where patterns are changing. Listen carefully so that you are not only picking up signals in your own organisation but all around you.

And make sure that you are not only picking up those signals but recognising them for what they are. Professor Ian Goldin described how, before the financial crisis, he had not joined the dots when a junior colleague told him that he had just bought a second

home in Florida. Admittedly, as he said, he might have received an inheritance; and politeness generally forbids anyone enquiring too closely into another's finances. However, an alert chief of staff might have picked up this information and wondered how easy it would be to buy a second home in Florida on a junior's salary. They might have asked a few questions and noticed that there was a growing market for sub-prime mortgages. Would that have stopped the financial crisis? No, but it might have started a conversation internally that could have enabled some financial organisations to be better prepared.

This ability to look outwards, listen for the weak signals, and, most importantly, summon the curiosity to question and interpret them is vital for helping organisations to prepare for and withstand the shocks that might emerge from the external environment.

## Speak truth to power, champion resilience.

Setting aside resources for risk management is often seen as a liability. This is a narrative that needs to be challenged: resilience is an advantage. However, there is often tension between the need for resilience and the desire for investment. The chief of staff is well positioned to lead arbitration between the two, asking how much it is appropriate to spend on resilience and where it should be allocated.

Investment in people, in particular, can be framed as strengthening resilience.

> *You have to know the organisation, know who does what jobs and how to invest in talent and continuing development.*

> *We have to make sure our talent is growing in the organisation and that we have a culture and identity that can attract and retain and grow that talent in the organisation over time.*

## Curate strategic conversations.

Ask, 'What can we as an organisation do in practical terms? Are we part of the problem? In which case, what do we stop? Or can we become part of the solution? In which case, how?'

These conversations should start with the leadership team:

> *My experience is that unless you've got the right terms from the very top, unless you've got the board and the C-suite seeing value rather than just risk then there's a problem.*

One suggestion was that the chief of staff should organise annual awaydays for the leadership team to discuss megatrends and keep a broad perspective rather than just focusing on operational matters. They could invite external speakers to introduce different ideas, or even draw on diverse and unexpected viewpoints from employees.

In many organisations there is untapped energy in 'the middle', amongst managers and more junior employees, particularly when it comes to a major challenge such as the climate crisis. Chiefs of staff usually already have connections with people throughout the organisation and can identify individuals who are particularly passionate and/or knowledgeable and who can become ambassadors for change.

> *I do think that somebody has to be curating the conversation and picking the moments. We have a day when all new partners meet for the first time. It's a key moment for them and a good opportunity to inspire them and also hold them accountable from that moment.*

# Finding space in the middle of the action

*Most chiefs I've encountered have a huge bias for action, but there's tremendous value in taking the time to think more. I've done quite a lot of strategy work in the past and it's always been very much about laying out 'This is what we should do' as opposed to, 'Well, this is what we imagine will happen, and these are the alternatives'.*

Chiefs of staff are often appointed because the role of the principal has expanded beyond what one person alone can achieve. It is usually seen as an operational, 'doing' role – accomplishing the tasks that the principal does not have time for themselves. However, if 'doing' is all that is needed, the principal just needs a capable executive assistant. A good chief of staff does more, bringing another dimension to the principal's leadership by creating space in the midst of the action to reflect, challenge, and be curious.

In fact, the importance of 'space' was a recurring theme throughout the programme – space for thinking differently, for capacity-building and resilience, and for personal and organisational wellbeing. Chiefs of staff need space themselves, as one participant described it:

*It's having the ability to do deep thinking on your own. Whatever way works for you. So for me it's going for a walk. It doesn't simply mean time. It also means freedom from distractions.*

Perhaps more importantly, they are also key to creating space for others.

This space to think more broadly and respond to changes in the wider environment is not simply absence of action. It is purposeful and designed, deliberately introducing new ideas and challenging existing beliefs.

*Conversations are the infrastructure of social systems like organisations, and you have to find a way to get productive disagreement on the table.*

*It is the time to think critically, to think differently, to have trust in the leadership but to also be trusted so it can be partnership working, learning with them. Having plenty of spaciousness and time to really think and come up with different scenarios is where the value is.*

While chiefs of staff are masters of the casual, opportune conversation which sparks ideas or reveals clues about what is going on in the underbelly of the organisation, they are also enablers of these critical conversations with the leadership team and other key executives. From a practical point of view they can make formal meetings happen, use their influence to ensure attendance by the right people, and summon the power of their network to introduce experts from outside the organisation.

However, these discussions are not effective without a strong foundation of trust. Without trust, and the psychological safety that makes it possible to challenge ideas or try out new things, conversations do not translate into action: they just become perpetual talking shops.

*In order to use that white space effectively, then you have to be in place of psychological safety.*

*I think it's healthy in most current roles to have the tools to make mistakes.*

*The foundation is trust. You are trusted to make mistakes, trusting to have, let's say, the right conversations and bring ideas that we need.*

Without that foundation:

*We're given the space, but we just don't feel that we can be honest, that open, more challenging, which is kind of a culture point as much as it is time. Even if we have the time, do we think we can use the time profitably?*

# ‘Uneasy lies the head that wears a crown’ [1]

Chiefs of staff are happy to describe themselves as servant leaders, or people who ‘lead from behind’. They do not crave recognition; and while there is some debate about how much authority they actually have, they typically see themselves as influencing from the shadows rather than pushing the organisation forward themselves.

Many principals, however, especially those that are CEOs, either see themselves as, or are expected to be, ‘heroic’ leaders. Despite increasing interest in and awareness of forms of collective leadership, the idea of the single, visionary, decisive individual driving the organisation to success is hard to shake. CEOs are held singularly accountable for performance, for values and standards, and for adherence to regulatory frameworks. Stakeholders expect them to have all the answers, and often burden them with unrealistic expectations.

Interestingly, this issue had not been raised in any previous Chief of Staff Executive Education Programme. But participants in the August 2024 cohort were highly aware of the need to support their principals by ‘managing the hero’. They talked about the ‘heavy load’ that principals carried, and noted that long hours and stress were viewed as a natural part of the leader’s job. Leaders have legitimacy because they have ‘paid their dues’ or ‘slogged it out’ in the past; but that only means that they have to continue work just as hard – if not harder – in order to maintain their credibility.

One approach is to ensure that there is an effective support system for the leader.

> *I work to the leader, you know, but he’s only one person. So I need to make sure he has a proper team around him that are empowered to make decisions, and therefore there’s organisational resilience that he can rely on.*

Most CEOs are aware of the dangers of their decisions’ not being tested or challenged. Indeed, the chief of staff is typically thought of as someone with express permission to speak truth to power and to tell the CEO when they are wrong. That role is important, but being an ‘honest friend’ and supporting the leader also involves praising – when appropriate and without sounding sycophantic – and telling the CEO when they are right.

The focus on a single leader can generate toxic behaviours in those around them. Participants described teams arguing in front of the CEO and trying to make them ‘pick a side’, or simply monopolising the CEO’s attention by talking too much.

[1]Shakespeare, Henry IV Part II, Act III, scene i

This of course can be an additional challenge for the chief of staff:

> *You can't get away from humans, they all have egos. There are things such as jealousy, and such a close connection to the principal can be seen as a threat to other people. Though for chiefs of staff it's not really about them, it's about the outcome, it's about delivering stuff for the leader, not everybody gets that. And so they may look at what you're doing as a chief of staff through their own eyes.*

Participants were aware that they often started the role with a 'trust deficit' and that colleagues might envisage them as Wormtongue (chief adviser to King Theoden in Lord of the Rings, who behaves as if he already rules the kingdom).

So how does the chief of staff go about sharing the principal's heavy load and improving leadership team effectiveness without inflaming tensions? The analogy for the role here is a 'container', absorbing the pressure, the competition, and the frictions circling the principal and the leadership team as a whole.

One way of containing the situation is consciously to think in terms of 'noticing'. That is, noticing and accepting the perhaps difficult emotions that are circling, and using 'I notice …' as a gentle way to draw the principal's attention to unhelpful behaviour. For example, 'I notice that X is being very quiet during meetings, and Y is perhaps overcompensating and talking more.' This approach allows the principal to remain visibly in charge while responding to the chief of staff's subtle advice.

# Oiling the wheels of transformation

> *I always say to people about the chief of staff role: imagine you've got beautiful engine; whether it's a Rolls Royce or a Vauxhall Astra, it needs oil. It needs to be good quality. It needs to be resilient. It needs to have the right viscosity. It needs to be able to take high pressures or to function in extreme cold. It's unseen, but it makes the engine purr. And I think chiefs of staffs are this critical component.*

Leaders are about change. Managers maintain; but leading is first and foremost about guiding people, taking them from where they are now to somewhere else. Leaders are almost by definition perpetually considering how to transform the organisation in order to anticipate or keep up with market disruptions, which are becoming more frequent.

Participants embraced the description of the role of the chief of staff as *'facilitating leadership effectiveness so that the leadership can facilitate organisational effectiveness'.* This puts the chief of staff right in the middle of any transformation.

It is important to remember that the chief of staff does not 'own' the transformation, any more than they own the strategy or culture. But there are specific things that only the chief of staff can do that will make the transformation more effective: influencing the types of questions asked; influencing the agenda; helping the leadership lead better; and, most importantly, making connections throughout the organisation and closing the gap between the leaders who are initiating change and employees who feel that the change in being 'done to' them.

Transformation programmes invariably start at the top, but they succeed or fail further down in the organisation – in the *'soggy middle'* where *'change goes to die'*.

Research by Saïd Business School and EY has revealed that organisational transformation is an emotional journey. While leaders and employees both start the journey at a similar level of excitement and optimism, as the transformation progresses and becomes more challenging, disillusionment and anxiety hit the workforce harder and faster than they do the leadership.

This resonated with the participants.

> *There are so many organisations that don't talk to the shop floor. The people up here think everything is going fine. But down at the bottom they're saying, 'this is going horribly wrong'.*

> *I'm not sure many leaders even think to question how everyone else is feeling.*

The chief of staff is one of the few people who can not only surface the emotions that are seething below the leadership level – from the middle of the organisation to the shop floor – but also manage upwards to influence the transformation programme itself so that it has the best chance of success. As participants discussed, simply reporting to leaders the sentiment within the organisation is often not helpful as it tends to lead to a focus on symptoms rather than causes, and to be dealing with problems after they occur.

Positive actions that chiefs of staff can take include:

## 1. Tell the leaders to stay cool

The more optimistic everyone is at the beginning of a transformation, the greater the dissatisfaction when the fruits of collective hard work do not appear instantly. Rather than trying to close the emotional gap between leaders and the rest of the organisation by attempting to enthuse people in the middle, chiefs of staff could encourage a calmer approach from the outset. Instead of communicating an exciting, long-term vision that leaves plenty of time for disengagement before it can be fulfilled, leaders might to better to break down the transformation programme into short-term achievable goals. Cumulatively, these will achieve the vision over time.

## 2. Address the issue of jobs head on, and as soon as possible.

*That's the first thing that anyone thinks of, isn't it? Am I still going to have a job?*

When announcing a transformation programme, it is difficult to enthuse people if they are preoccupied with worry about their jobs. If change is to be achieved with no job losses, then it is important to say that first, freeing employees up to listen to the new ideas.

If it is likely that there will be job losses, it is still better to address that first, even if the details are unknown. It gives people time to prepare emotionally and to consider their options.

## 3. Surface and understand resistance

There will be resistance to any transformation programme, though it may not be overt. It is often said that people do not fear **change**: they fear **loss**. And addressing it requires empathy. People do not always know themselves what loss it is they fear, or if they know, they may be reluctant to articulate it – who wants to admit to fearing a loss of 'power' that comes with understanding the current systems inside–out? That would entail admitting the fear that they may not be able to understand the new systems or work in the new environment. They will not raise these issues in meetings or even write them down in anonymous surveys. Surfacing and understanding fears, and the resistance that comes with them, is something that the chief of staff, with their social skills, deep listening and noticing skills, and well-developed empathy is uniquely placed to do.

## 4. Mark small wins

A long-term vision is difficult to keep believing in if you do not see the progress that is being made towards it. That is true for individuals as well as organisations. So it is important to recognise positive achievements and steps on the way to the eventual goal. This will keep people engaged and positive.

## 5. Celebrate endings

Endings are often imagined to be indicative of failure. But they are also turning points: opportunities to let go of the past and look forward to something new in the future. Downplaying endings – of a particular way of working, or of jobs, departments, products or places – validates the idea that they are associated with failure and something to be ashamed of. Celebrating endings, however, gives an opportunity to reflect on and praise achievements and goals that have been achieved. Celebrations become opportunities to renew commitment and reinforce confidence in future achievement.

# Conclusion: tips, challenges, and learning points

## Think before you speak

The chief of staff's belief that they are a servant-leader, operating behind the scenes and able to connect with people at all levels of the organisation can blind them to the impact of their own words and actions. Participants emphasised how important it was to be aware of how you can be perceived, and to be deliberate and thoughtful in what you say and how you say it.

> *Don't be naive to the power that you have through your connection to the principal.*

> *Whatever you say is taken so critically at face value that you always have to make sure that you're watching your words carefully. There's a difference between 'My principal thinks…' and 'I think my principal thinks…'*

> *Taste your words before you say them. I'm often told my super-strength is my honesty and kind of being direct, but equally that can be negative if you do it in the wrong way.*

## Embrace your humanity

Technology is proliferating and AI, in particular, is widely predicted to have a substantial, if not existential, impact on organisations, societies, and jobs. How should chiefs of staff be thinking about AI and how will it change the role?

> *We talked about the idea of either technology or augmentation or technology takeover as the two extremes, but one thing that we did establish was whatever happens, we always will need to have a human in the loop.*

> *Execution tasks will probably be automated so that all will become more strategic in nature. But you still need someone to connect the dots.*

The question that underlies most of our executive education programmes is, what is it that the chief of staff is uniquely placed to deliver, or uniquely able to do that facilities leadership and organisational effectiveness? Discussions invariably focus on advanced people skills, the ability to embrace ambiguity and paradox, and the ability to grasp new ideas and new capabilities quickly: in other words, human connectedness.

> *So much of our roles are about the micro moments, like the conversations that only we could have, the nudge that we made to make a project on time, the thing we saw over the horizon that nobody else did … and someone also once said to me that that no one would know the impact that I have until I leave and things stop working.*

> *We're essentially laying the road down for something that's going to happen in the future that people in your team can't see.*

> *For all of us that have gone from being an expert in managing teams and pushing out perfection over and over again, it is uncomfortable to be thrown into this role where you're seemingly asked every day to do something new for the very first time. You just feel like your delivery is not up to par with what it's been before, and yet that is the point. Your job is not perfection. Your job is to do something for the very first time better than somebody else.*

## Utulise the power of your chief of staff community

As a servant-leader and someone who is typically naturally outward-facing, the chief of staff can neglect their own personal and professional wellbeing and development.

> *As chief of staff, we juggle so many balls and you often don't have time to reflect, right? It makes you go back and really think about your role, what you're doing, what things do I know? What things do I need to work on differently?*

One of the benefits of a programme of this nature is that it facilitates a community that provides for the chief of staff what they provide for their principal – support, a sounding-board, new perspectives and reframing of problems, and the sense of having a 'tribe'.

> *A CEO or an executive or a principal is oftentimes acknowledged as one of the most lonely positions, if not the most lonely position in an organisation. But the next most lonely position is often the chief of staff because of what you are carrying up, down, left, right. All of those sorts of things that you really have to be portraying and being a little bit of everything for everyone. And I think one of the things from this programme is not only acknowledging that, but also reminding yourself that in the same way that you, as a chief of staff, are supporting your principal in the loneliness, you need to create your own tribe to make sure that they are doing the same thing for you, whether that's being a sounding board or speaking truth to your power.*

> *You have a chance to stop and think. And I think that's been quite a constant that we don't get time to prioritise ourselves because everyone else is a priority. So reflection time, making time to think and really thinking about the value of that in our own practice. And learning that we need to value it; no one else is going to value it for us.*

> *There's lots of people have said it can be lonely being a chief of staff. You know you're not the leader, but you're somewhere floating between them and the rest of the organisation. So we need this mutual support from outside organisations, because we're not getting it inside our organisation.*