The Corporate Chief of Staff: Strategic Leadership Influence From Outside the Spotlight

7 authors, including:

Steven Zhou
George Mason University
22 PUBLICATIONS   **59** CITATIONS

SEE PROFILE

Nathan J. Hiller
Florida International University
35 PUBLICATIONS   **3,453** CITATIONS

SEE PROFILE

Stephen Zaccaro
George Mason University
129 PUBLICATIONS   **15,902** CITATIONS

SEE PROFILE

Richard J Klimoski
George Mason University
140 PUBLICATIONS   **8,172** CITATIONS

SEE PROFILE

Article

The Corporate Chief of Staff: Strategic Leadership Influence From Outside the Spotlight

Steven Zhou[1] (iD), Nathan J. Hiller[2], Stephen J. Zaccaro[1],
Lauren N. P. Campbell[1], Renee McCauley[1], Tyler Parris[3],
and Richard J. Klimoski[4]

Abstract

For decades, scholars of strategic leadership have explored the degree to which senior executives and the team of top managers influence firm outcomes. However, one growing quasi-executive role in corporate settings, the chief of staff (COS), has been almost entirely ignored. Our paper presents a novel, foundational exploration of the COS role, including primary job functions and challenges, characteristics and backgrounds of incumbents, and relevance for strategic leadership and upper echelons theory. We synthesize three original sources of data — 2,500 LinkedIn COS profiles, surveys of 108 COSs, and in-depth interviews of 13 current and former COSs — to identify COS tasks and functions that interface with and influence the CEO, the top management team (TMT), and the broader organization. Though not typically considered a member of the TMT, we find compelling evidence for their 'behind the scenes' relevance to strategic leadership processes and outcomes. We then lay out a future research agenda comprising four domains: COS influence on CEO attention and psychological states, COS influence on TMT and organizational processes and outcomes, characteristics and conditions of organizations with a COS, and long-term career trajectories of COSs.

A host of factors influence the ultimate performance and fate of organizations (Hannan & Freeman, 1977; Hambrick & Quigley, 2014). Among these factors, research now spanning five decades has firmly established that the strategic choices, actions, and performance of organizations are meaningfully influenced by the seniormost leaders in organizations (Bromiley & Rau, 2016; Wang et al., 2016; Samimi et al., 2022). This "upper echelons" perspective (Hambrick & Mason, 1984), along with the related area of strategic leadership, has expanded from an original primary focus on CEOs (and particularly the individual difference variables thereof) to a broader consideration of senior executive roles and processes surrounding the top management team (TMT). As Alvarez and Svejenova (2022) have carefully documented, the study of top executive roles examined has expanded from Chief Operating Officers (COOs; see Hambrick & Cannella, 2004) to include dozens of studies of other specific C-suite roles, such as Chief Financial Officers (CFOs), Chief Technical Officers (CTOs), Chief Human Resource Officers (CHROs).

An increasingly prevalent role in many organizations that has been notably absent from scholarly conversations in

strategic leadership is the chief of staff (COS; Ciampa, 2020; Parris, 2015). This role, which reports to and works closely with the CEO, is positioned outside of past research operationalizations of the "top management team" (TMT) by management and strategy scholars (Krause et al., 2022) and is also absent from required corporate regulatory filings where the five seniormost executives are named. These factors together render COSs' absence from corporate scholarly research not entirely unsurprising; nonetheless, as we describe in this paper, the COS sits at the interface of the upper echelons and appears to be particularly important to developing a more rounded picture of strategic leadership processes. In fact, in perhaps the only empirical study

[1]Department of Psychology, George Mason University, Fairfax, VA, USA
[2]Department of Global Leadership and Management, Florida International University, Miami, VA, USA
[3]chiefofstaff.expert, Seattle, WA, USA
[4]Costello School of Business, George Mason University, Fairfax, VA, USA

Corresponding Author:
Steven Zhou, Department of Psychology, George Mason University, 4400 University Drive, Fairfax, VA 22030, USA.
Email: szhou9@gmu.edu

using corporate Chiefs of Staff (COSs) as a sample, Barnes et al. (2023) focus on how the CEO can be "heedfully challenged" by those around them—suggesting one of the ways that COSs matter in the context of strategic leadership.

Our work also draws modestly from a limited body of research of COSs in military and government settings where it is often an institutionalized role within the organization. However, the focus of this paper is the emerging corporate COS role. We do not presume direct translation of the role between these vastly different settings. Our paper is the first to empirically and broadly evaluate the COS role in corporate settings in order to offer insight on what the role entails, the types of people who are COSs, and their influence on strategic leadership.

This paper is structured as follows. First, we review popular press articles and the limited research and writing about the COS role in military and government contexts, which serves as a backdrop to inform the research questions and multi-source data collection including biodata scraped from 2,500 LinkedIn profiles for current COSs, survey data from 108 current and former COSs, and in-depth interviews with 13 current and former COSs. Much like prior studies on underexamined C-suite roles (e.g., Kunisch et al., 2022; Menz & Scheef, 2014), we explore the COS role with a specific focus on the functions of the role and types of people inhabiting such roles. In doing so, we show how COS role expectations and functions are relevant to the strategic functioning of the organization and are likely to be a rich predictor of effective (or ineffective) TMT dynamics and key processes historically focused upon by the upper echelons/strategic leadership literature (e.g., sensemaking, behavioral integration, and TMT cohesion; Neely et al., 2020). Our exploratory study demonstrates that COSs often play a central role in CEO sensemaking, TMT processes, the CEO–TMT interface, and strategic action and coordination throughout the organization. For each of these major COS functions derived from our data, we formulate propositions intended to guide and frame future empirical research. In sum, we shed additional light on an increasingly prevalent role that falls just far enough outside the visible power structures of organizations to have been previously seen—but one which appears to be a particularly strong source of, and influence on, strategic leadership phenomena. Indeed, it appears that COSs have been "hiding in plain sight".

Existing Understanding of the COS Role

In military and government contexts, the COS title is regularly used, widely acknowledged, and fairly well understood by people within these organizations. In the political sphere, Cohen et al. (2016) traced the original role back to the 1950s White House and identified four enduring key roles of the White House COS, which they see as "critical to the overall success or failure of an administration" (p. 15). These roles are: *administrator* (overseeing policies and managing operations), *advisor* (counseling the President, offering advice and opinions, and ensuring that the President hears from multiple different advisors), *guardian* (protecting the President's time, attention, and interests from both internal and external stakeholders), and *proxy* (acting on the President's behalf to both internal and external stakeholders).

In the US military context, certain COS roles are institutionalized by law within the organizational structure and are among the seniormost positions of authority within various domains. For example, the Chiefs of Staff of the Army, Navy, and Air Force report directly to the Secretary of their respective branch—and have a broad set of formal responsibilities and power for staff matters, upward advisory, and acting as an agent of the Secretary. Yet at lower levels of the military, many units led by general officers also have a COS that manages the activities of that general's staff and serves as a conduit between the general and his or her staff. In terms of duties and goals, a report by the Deployable Training Division (2020) outlined that joint military COS position holders need to be a: "hands-on, tuned-in leader and synchronizer of a complex HQ that supports not only the commander's decision requirements, but also subordinate operational mission requirements, mission partners, and higher headquarter's information requests… leads, coaches, and mentors the staff… and is the staff integrator and synchronizer" (p. 1).

This existing body of knowledge on the COS role in military and government organizations indicates clear potential relevance for strategic decisions, processes, and outcomes —both directly and indirectly. For example, references to the COS as an *advisor* allude to the potential influence of the COS in CEO sensemaking and decision-making (Athanasopoulou et al., 2020; Cahill, 2006). References to the COS as a *synchronizer* suggest, for example, facilitation of TMT behavioral integration (Neely et al., 2020; Sterling, 2003). Yet given the relatively recent emergence of the COS role in corporate contexts and the differing nature and formalization of many roles in corporate contexts vis a vis government and military organizations, we believe specific attention is warranted.

Several non-scholarly publications do provide some additional clues about the functions, occupants, and relevance of COS roles. Ciampa (2020) suggested five primary duties in a Harvard Business Review piece: metaphorical air traffic controller for senior leaders, integrator, communicator, honest broker and truth teller, and confidant. Other popular press articles have noted similar typical COS functions, the history of the role, and why organizations need a COS (DeWahl, 2019; Marcus, 2018; Niebauer, 2018). Parris' (2015) interviews with COSs, and his prior experience as a COS, led him to suggest it as a widely

varying catch-all role, filled by individuals with strong organizational and people skills, who handle all manner of tasks not covered by an existing member of an executive's leadership team or administrative staff (p. 18). However, apart from recent evidence that corporate COSs can play a role in presenting alternative perspectives (Barnes et al., 2023), we know very little from empirical scholarly sources about the nature and breadth of corporate COS roles, nor about the people who hold this position. The present paper offers a more holistic picture of the wide variety of job functions that the COS role fulfills, with the primary goal of raising important research questions for future studies to build on.

The Present Study

Building on non-academic work on COSs and the limited scholarly work in government and military contexts, alongside phenomenological expertise of a member of the author team with experience as a COS and as a network creator for other COSs, in this study we systematically examine the corporate COS role. Our preliminary investigation is guided by two foundational research questions.

> *RQ1:* What are the primary role functions and expectations for corporate COSs?
> *RQ2:* What are the characteristics and backgrounds of people who serve as corporate COSs?

To answer these questions, we use a multi-source, mixed method approach including both quantitative and qualitative analysis of archival publicly available data from LinkedIn, as well as interviews and survey responses from current and former COSs. We interpret the descriptive trends from these data and develop a series of conceptual linkages to current topics in the strategic leadership literature, culminating in a series of research propositions.

Methods

Archival Data From LinkedIn

Archival data from LinkedIn were scraped during the months of March 2022 through June 2022. The lead author manually searched on LinkedIn using the PRO Sales Navigator (https://business.linkedin.com/sales-solutions/sales-navigator) tool, which provides access to public information on LinkedIn profiles. Profiles were filtered to only display US-based individuals with the "Chief of Staff" title working in any industry except for government and military, excluding self-employed and temporary employment. This search criterion led to a match for approximately 25,000 displayed profiles.

Data from the first 2,500 profiles were manually collected with no sort functions placed on the search. There were no identifiable algorithms (e.g., prioritizing 1st/2nd degree connections higher on the list), nor did there appear to be any other clues suggesting that these first selected profiles were systematically different from later appearing profiles (which was further confirmed by conducting a sample selection-bias study[1]). For each profile, we captured variables such as exact job title, current job tenure in years, job title of position immediately prior to their current COS role, years of work experience since the year they completed their highest level of education, and highest level of education. We also assessed internal promotion/transfer vs. external hire based on listed work history. After obtaining a full list of all organizations listed in our sample, we manually searched the web for company size (number of employees) and the year the company was founded in order to determine company age. We were able to obtain sizes for 2,024 organizations and tenure for 2,021 individuals.

Survey Data

Next, we developed a survey intended to measure the variety and elements of the COS role. A list of task statements describing the COS job role drawn from prior literature (see Appendix A), current COS job ads, and input from our co-author with subject matter expertise was used to create these role element questions. Question phrasing and response anchors were drawn from best practices in job and task analysis (e.g., Arthur et al., 2005; Burke, 2004). To limit burden on the participants, the survey displayed a randomly selected subset of 15 of the 43 total task statements. Participants rated the frequency with which they engaged in each task as a COS (on a scale of *1 = yearly or less* to *7 = hourly or more*) and the importance of this task to being successful as a COS (on a scale of *1 = not important* to *5 = extremely important*). Participants also answered questions about the hierarchical level at which their COS position was classified, their prior job immediately before becoming a COS, demographics (e.g., education), and whether or not their organization recently had a change in CEO.

Participants were recruited from a prominent networking organization consisting of approximately 700 current and former COSs (chiefofstaff.expert). Through email blasts and LinkedIn posts to the members of the organization, we posted an IRB-approved recruitment message inviting individuals to complete the survey. As an inducement for participation, 25 participants were randomly selected to receive a signed copy of a book about COSs, while other participants received a branded dry erase board. Funding for the incentives was provided by the networking organization, though they did not have access to the data nor were

they involved in analysis of data. Surveys were collected from June 2022 to July 2022. In total, 108 participants completed at least the first section of the survey (task statements).

Interview Data

At the end of the survey, participants were invited to indicate interest in participating in a follow-up interview. Interview invitations were sent out using an IRB-approved script to all participants who were willing to be interviewed. Efforts were made to invite a diverse group of participants based on race and gender. Participants received a US $20.00 Amazon gift card and a 30-minute coaching session with an expert COS advisor. In total, 13 interviews were conducted.

Each interview was conducted by two interviewers following a semi-structured format (see Appendix B for full list of prompts and question bank). Interviews were audio-recorded and then transcribed, with personal identifiers removed and names replaced with pseudonyms. Interviewees had an opportunity to review the transcript and make final changes before the transcripts were finalized for analysis and the original recordings were deleted.

Three authors read every transcript and independently extracted quotes relevant to the research questions. To guide the analysis, direct quotes were extracted that were related to one or more of the following areas: (a) job responsibilities, (b) job requirements such as Knowledge, Skills, Abilities, and Other characteristics (KSAOs), (c) changes in the job, (d) relationship between COS and others in the organization including C-suite members, and the (e) incumbent's views of organizational benefit(s) and drawbacks related to the COS position. Quotes that were identified by all three authors independently were retained for inclusion in the paper and to assist with identifying key themes.

Results and Discussion

Given the exploratory nature of this study, we have combined the results and discussion sections to present a set of key themes developed from integrated interpretation of trends from all three data sources. Our analysis is descriptive in nature: we looked primarily at the survey and interview data sources to first understand what COSs *do*, by obtaining descriptive ratings of the task statements and interpreting the relevant quotes extracted from the interviews. Next, we looked primarily at the LinkedIn and survey data sources to understand who COSs *are*, by obtaining descriptive demographic breakdowns and comparing crosstabs of variables such as gender and years of experience. These data were used to present descriptive accounts (e.g., frequencies, proportions, cross-tabulations, and exemplar quotations) of COS job functions, relationships with key groups inside the organization, characteristics and work histories of incumbents, additional contextual insights, and broader impact of the COS role on strategic leadership phenomena.

RQ1: What do Chiefs of Staff do?

Our findings suggest that the primary responsibilities of a COS can be organized into three areas defined by individual(s) within the organization with whom the COS most commonly collaborates and influences: (1) the COS and the CEO, (2) the COS and the (rest of the) TMT, and (3) the COS and the rest of the organization. Each category includes specific job responsibilities that the COS may hold based on the survey responses and interview quotes, followed by discussion on how this informs or changes our understanding of strategic leadership.

COS and the CEO. Our research suggests that the COS has substantial influence on, and job duties related to, the primary corporate CEO. These can be broadly characterized as follows: (a) being an advisor, sounding board, and confidant to the CEO; (b) preparing the CEO for meetings or presentations; and (c) influencing their attention and calendar agendas (who is on and what is discussed). One of the other things they do is feed and filter information from throughout the organization to the CEO—which they are in a unique position to provide given that they broadly interface with so many different stakeholders across the internal organization. On the ratings for the 43 tasks in the survey, the top most frequently performed and important tasks included "Acting as a sounding board for the CEO's ideas" (average rating 4.68/7.00 on frequency and 4.50/5.00 on importance) and "Advising on high-level strategic or urgent matters" (4.53/7.00 and 4.03/5.00). Table 1 provides the full list of all 43 tasks and their ratings.

Similarly, interviewees frequently described their close relationship with, and high degree of influence on, the CEO, built on a foundation of mutual trust and respect. One interviewee said, "supporting [the CEO] as a thought partner in his leadership style and the way he interacts with our team… I'm usually the first kind of sounding board to help him in finding some blind spots or things to consider"; another described the CEO–COS relationship as "becoming a bit of a confidant in some cases, it could be bouncing ideas about things off of me, it could be communicating some things for the first time… there's a bit of an executive coaching role." Put simply, the COS may have more influence on the CEO than almost any other stakeholder in the organization. As a person with substantial influence on the CEO's calendar, directing their attention to key priorities (and away from others), challenging the CEO, and serving as a confidant for the CEO's first thoughts and rawest ideas, the COS has potentially enormous influence on the CEO's decision-making processes and outcomes.

Table 1. Ratings of 43 Tasks on Frequency and Importance, Sorted in Descending Order by the Highest Ratings of Frequency and Importance (Summed) to the Lowest.[2]

Task	n[3]	Frequency (out of 7)	Importance (out of 5)
Foster a positive organizational culture	36	5.06	4.52
Acting as a sounding board for the CEO's ideas	28	4.68	4.50
Track and manage progress on key strategic projects and initiatives	33	4.70	4.43
Working with key leaders to drive strategy and implementation	34	4.68	4.48
Implementing the top strategic initiatives of the CEO	37	4.51	4.63
Gathering facts	35	5.09	4.21
Facilitate effective meetings by designing the structure of meetings in advance, framing discussions and leading meetings, and synthesizing information and agreements for follow up after the meeting	33	4.61	4.33
Ensuring cross-functional accountability for execution against objectives	39	4.31	4.33
Advising on high-level strategic or urgent matters	30	4.53	4.03
Overseeing processes	31	4.61	3.84
Playing devil's advocate, questioning assumptions, and eliciting dissenting viewpoints to prevent groupthink	33	4.49	3.89
Drafting or advising on communications from the executive or leadership team to internal stakeholders (e.g., other employees)	34	4.21	4.17
Maintain relationships with lower-level employees	28	4.25	4.03
Convening internal stakeholders	40	4.25	4.03
Buffering difficult relationships	44	4.32	3.97
Supports principal executive on transformational change efforts like restructuring or large special projects, investigating merger and acquisition options, data gathering/analysis or information on specific deals that are on the exec's table, and feasibility studies before taking decisions to a board	31	3.71	4.37
Clarifying decision rights and responsibilities	28	4.43	3.76
Plan and execute ad hoc leadership/development events, like cross-functional workshops, tiger teams, ad hoc offsites, etc., including defining key themes and outcomes	33	3.09	4.21
Determine the agenda items for C-suite and board meetings	36	3.69	4.00
Identify "influencers" who are critical to the success of the CEO's agenda	31	3.90	3.54
Standing in for, negotiating, and/or making decisions on behalf of the CEO with internal stakeholders (e.g., employees, leadership team)	44	3.84	3.71
Drafting or advising on communications from the executive or leadership team to external stakeholders (e.g., stockholders, potential investors, media)	37	3.62	3.84
Acting as an "enforcer" for the CEO	45	3.98	3.32
Managing the CEO's schedule and agenda	42	3.98	3.31
Monitor and allocate the CEO's time spent across activities	36	3.83	3.38
Analyzing complex data sets to make meaning and frame issues for the principal executives or leadership team	29	3.14	3.53
Manage direct reports in support of Chief of Staff duties	34	3.82	3.29
Managing personnel	34	3.85	3.11
Collecting, organizing, consolidating, and cleaning organization-related data from internal sources	35	3.49	3.29
Create governance venues and processes across the enterprise or divisions to address new/unfolding realities not covered by existing policies and governance venues	34	3.03	3.38
Manage or support leadership transitions, like the introduction of new C-suite leaders or department heads or their departures	38	2.50	3.60
Draft policies for unfolding realities not covered by existing policies	32	2.69	3.48
Maintain performance analytics scorecards	36	3.00	3.18
Partner with principal exec, CFO, GC, CHRO, others to ensure regulatory compliance on a variety of fronts (e.g., business continuity planning, diversity and anti-harassment training, auditing, anti-bribery and corruption policies)	43	2.98	3.18

Table 1. (continued)

Task	n^3	Frequency (out of 7)	Importance (out of 5)
Standing in for, negotiating, and/or making decisions on behalf of the CEO with external stakeholders (e.g., stockholders, potential investors, media)	30	2.17	3.40
Managing the principal executive's leadership brand beyond the organization (e.g., speaking engagements, nonprofit work, board involvement)	35	2.74	3.16
Convening important external stakeholders (e.g., stockholders)	38	2.97	2.97
Refereeing disputes between company employees	42	2.79	2.78
Temporarily backfill departed leaders on an interim basis	38	2.50	3.08
Manage financial budgets for C-suite leadership	39	2.62	2.67
Speaking to external stakeholders (e.g., media, regulators)	31	2.68	2.61
Engaging in succession planning to transition from one CEO to the next	33	1.33	2.73
Firing personnel	36	1.17	2.15

This function of the COS illuminates several new research paths for understanding CEO attention and sense-making. Substantial research in upper echelons theory has focused on the power of the CEO to set varying directions for the firm and, subsequently, the factors that directed CEO attention and focus to specific activities and away from others (Gifford, 1998; Hambrick & Mason, 1984; Ocasio, 1997). Moreover, substantial research has focused on how CEOs regulate conflicting demands on their attention (Hambrick & Abrahamson, 1995; Smith & Tushman, 2005) and, more recently, on CEO state of mind shifting between short-term and long-term orientation (Wang, 2024). Our data suggest that the COS serves in a behind-the-scenes role with a unique communication path directly to the CEO, suggestive of their influence on CEO attention and orientation. This not only mirrors the role of the COS as an advisor in the White House context (Cohen et al., 2016) but is also consistent with, but a substantial extension of, Barnes et al.' (2023) description of "heedful challenging" by corporate COSs—whereby a "lower-power individual" asserts influence over a higher-power individual.

COS and the TMT. Our results suggest that the COS is often responsible for facilitating and setting the agenda for TMT meetings, influencing and managing TMT behavioral integration and relational processes by smoothing over conflicts and brokering across differences, and working with TMT members to push the agenda and strategic priorities of the CEO. In addition, the COS sometimes also brokers access to the CEO from other TMT members. The task ratings ranked as most frequent and important were as follows: "Working with key leaders to drive strategy and implementation" (4.68/7.00 on frequency and 4.48/5.00 on importance), "Ensuring cross-functional accountability for execution against objectives" (4.31/7.00 and 4.33/5.00), and "Convening stakeholders", which includes the TMT and others (4.25/7.00 and 4.03/5.00).

The responsibilities and tasks of COSs vis-à-vis the TMT present several challenges, particularly involving the nature of their authority and influence. They do not hold an 'officer' title (in comparison to CFOs, CTOs, CHROs, or COOs) and do not have a primary functional responsibility (such as C-suite roles in finance, technology, marketing, or production), yet they operate amongst these TMT members and need to wield influence with these higher status individuals. Several interviewees mentioned that their known proximity and access to the CEO's thought processes, goals, and objectives provides a type of authority and influence that could be characterized as "reflected authority", with one interviewee summarizing it succinctly as "because of my proximity to the CEO, I have more power [than my title or formal role suggests]." Thus, our first point identifying the substantial influence the COS has on the CEO due to their close relationship leads to this second point; because of that close relationship and proximity, the COS may reflect the authority of the CEO in their absence when working with TMT members. In addition, and as mentioned elsewhere in this paper, COSs also discussed a degree of influence attained through earned credibility over repeated interactions with TMT members and may also in some cases have a more clearly articulated "surrogate authority" directly from the CEOs words and actions.

Moreover, qualitative data from our interviews points to the COS frequently involving careful management of TMT relationships both among TMT members and between these members and the CEO. For example, one interviewee said "[I] typically have to run meeting cadences, this will include leadership meetings, board meetings… cross-functional meetings," while another said "I specifically assist on coordination and general communication amongst the leadership team." One interviewee even described their role, in relation to the TMT, as "filler of gaps and herder of cats," referencing how they are the primary coordinator, facilitator, and agenda-driver for the TMT, thus pointing towards their role in

facilitating TMT behavioral integration or the variety of group process elements that allow for open information exchange and collaborative decision-making (Carmeli & Schaubroeck, 2006; Lubatkin et al., 2006). The interviewees all described how important it was for them to have the trust of the other TMT members so that they can exercise influence and, in some cases, serve as a proxy or liaison for the CEO with TMT members.

These data suggest that the COS might play an important role in facilitating relational TMT processes (Neely et al., 2020)—how team members relate and interact with each other—and distributed cognition (Heavey & Simsek, 2017)—knowledge and expertise distributed across multiple TMT members. Our data suggest that the COS is involved in facilitating the "black box" of TMT relational processes that Nelly et al. (2020) described, through their informal influence on and frequent interactions with various TMT members. Moreover, the COS appears to be involved in aligning TMT member cognition in terms of setting agendas and meetings and managing projects in a manner that helps integrate individual TMT members' knowledge, expertise, and perspectives. Moreover, the COS appears to be uniquely suited to serving as a generalist that can speak multiple metaphorical languages with TMT members, creating connection and synchronization among multiple business functions, thus facilitating such TMT processes.

In their book chapter about the COS role, Zhou and Klimoski (2023) addressed the "political-interpersonal context in which the TMT and the CEO interact" where political-interpersonal dynamics "will affect the thinking, the decisions, and the behavior of the CEO… while engaging, both individually and collectively, with the members of the top management group" (p. 167). In this proximal or meso space surrounding the CEO and the TMT, the COS builds and maintains relationships among team members in a way that may profoundly impact business operations and executive decision-making. Our data on COS job duties suggest political skill (Ahearn et al., 2004) and boundary spanning (Marrone, 2010) as key competencies for COS effectiveness, which future studies can explicitly test as job requirements, or mediators of COS–TMT processes.

COS and the Organization. The COS plays a critical role in facilitating strong relationships between the CEO/TMT and the rest of the organization, bridging the gap through functions such as implementing strategic plans and special projects, identifying and triaging crises within the organization, and standing in (usually internally) for the CEO as proxy when needed. In fact, three of the five most frequent and important tasks were "Working with key leaders to drive strategy and implementation" (4.68/7.00 and 4.48/5.00), "Implementing the top strategic initiatives of the CEO" (4.51/7.00 and 4.63/5.00), and "Track and manage progress on key strategic projects and initiatives" (4.70/7.00 and 4.43/5.00).

Our interviewees offered specific examples of how they functioned as a "translator" to bring CEO and TMT priorities and decisions into operations, implementation, planning, and communications to the rest of the company. For example, one interviewee described "leading this change project on our go-to-market value proposition… the change is happening in the founder's mind, but he's not able to cascade it to the rest of the functions in the integrator role." Another described a situation where "the founder realized a sudden shift in the market, even before he can articulate it, and [I am] proposing how to translate and cascade that into business implications in a way that the different functions execute." In other words, while the CEO and TMT decide on a strategic goal, vision, or opportunity, the COS is often responsible for overseeing how that goal translates into day-to-day operations of the organization. Moreover, some interviewees described how this dynamic happens in reverse when the COS observes or identifies challenges faced by members of the organization, brings them to the CEO's attention, and helps identify and decide upon solutions. One key example of this was in managing the post-pandemic return-to-office initiative noted by several interviewees. Several described their COS role to include listening carefully to the opinions and feelings of employees, to in turn help their CEO make the best decision regarding return-to-office policies, and, finally, carefully communicating and implementing said decision back to the organization to facilitate a smooth transition and acceptance by team members.

Thus, the COS has a unique and important role of translating the CEO's vision and strategy into actionable implementation. Researchers have highlighted the importance of alignment between bigger-picture strategy and vision with the actual implementation of said vision, i.e., "putting the strategy into practice" (Ates et al., 2020, p. 638). The COS role appears to converge at this intersection of strategy/vision and execution/operations. Such a function suggests a need for both more strategic big-picture thinking than an executive assistant and more detail-oriented task management than another C-suite leader (e.g., the COO). Indeed, when considering what attributes are necessary to be a good COS, the two strongest themes from the surveys and interviews were high levels of conscientiousness and the ability to shift between big-picture thinking and tactical detail. In other words, a COS needs to simultaneously be able to operate at a high level in the organization (e.g., engaging in strategic vision-casting) while also overseeing and enacting detailed day-to-day operational tasks.

What the COS Does Not Do. Finally, it is worth briefly noting that our survey data (Table 1) offers insights on the boundaries of the COS role, i.e., what the COS does not do (or rarely does). Perhaps contrary to a plausible perception—and somewhat contrary to the title itself—the COS is rarely involved in formally managing staff. While some

interviewees mentioned having a small team of assistants reporting to them, their key relationship is not overseeing or managing staff nor in an HR capacity. The task statement with the lowest score on frequency and importance was in firing personnel, with another low-scoring task including refereeing disputes between employees. In addition, our task and role self-ratings show a clear pattern regarding the internal (vs. external) visibility of the COS. External-facing tasks such as speaking to, convening, and being a proxy for the CEO with external stakeholders were among the lowest rated tasks in both frequency and importance. Together, this suggests that the COS role is, on the whole, neither staff/managerially focused, nor does it typically have substantial external visibility.

RQ2: Who are Chiefs of Staff?

To answer this question, we primarily drew from archival data collected from public LinkedIn profiles of current COSs. Data were scraped from 2,500 profiles in non-military and non-government organizations (see Table 2 for the descriptive results). Average job tenure (number of years in incumbent position) was 1.5 years ($SD = 1.7$, median = 1), the average number of years of *prior* experience as a COS was 0.6 years ($SD = 1.6$, median = 0), and the average number of years of general work experience was 13.9 years ($SD = 7.1$, median = 12). Approximately 46.5% of profiles indicated completion of a graduate degree (Masters, MBA, JD, or Doctorate). In terms of prior roles, only 4% of COSs held immediately previous roles as executive assistants, indicating that this role is not best thought of as an "elevated" or promoted executive assistant. When looking at basic correlations and crosstabs, some notable relationships between these variables emerged. Specifically, men COSs were slightly less likely to have work experience as a COS ($r = -.07$, $p < .01$) but more likely to have higher education ($r = .06$, $p < .01$). Of the small minority of COSs who were formerly executive assistants ($n = 98$), a clear majority of them were women (83.7%). Finally, COSs employed in older and larger organizations were more likely to have more experience as a COS ($r = .10$ and .13, respectively, $p < 0.001$) and higher education ($r = .15$ and .16, respectively, $p < 0.001$).

Descriptive analysis of survey participants (see Table 3) showed similar trends, though it appears our survey participants were slightly longer tenured than the archival sample. Survey respondents reported an average age of 42.4 years ($SD = 9.0$ years, median = 42), average job tenure of 3.1 years ($SD = 3.4$, median = 2), average years of experiences as a COS of 4.4 years ($SD = 3.8$ years, median = 3), average years of general work experience of 19.9 years ($SD = 9.1$, median = 20), average number of subordinates of 4.3 people ($SD = 7.5$, median = 2), and average age of the organization of 47.6 years ($SD = 58.0$, median = 20). Moreover, COSs

Table 2. Descriptive Results of LinkedIn Archival Data ($n = 2,500$).

		Percent of Sample
Gender Presentation	Woman	53.2%
	Man	40.1%
	Unknown or Other	6.7%
Prior Job Level	Director	15.7%
	Chief of Staff	13.0%
	Manager	11.9%
	Vice President	7.8%
	C-Suite	4.7%
	Head	4.0%
	Executive Assistant	3.9%
	Senior Director	3.8%
	Senior Manager	3.7%
	Associate	2.5%
	All Else	28.9%
Internal Promotion?	Yes	38.1%
	No	61.9%
Highest Education Level	High School Diploma, GED, or Associates	0.8%
	Bachelors	48.0%
	Masters	17.9%
	MBA	23.5%
	JD	2.4%
	Doctorate	2.7%
	All Else	4.5%
Size of Organization	1–24 employees	18.1%
	25–49 employees	9.6%
	50–99 employees	8.8%
	100–249 employees	13.0%
	250–499 employees	7.0%
	500–999 employees	6.0%
	1000–4999 employees	11.3%
	5000 + employees	16.7%
	Unknown	9.4%

who reported more years of job experience as a COS were more likely to be employed in older organizations ($r = .35$, $p < .01$). Also, women COSs reported having fewer subordinates ($r = -.22$, $p < .05$), but there were no other significant relationships with gender. These data offer some interesting insights with regard to *who* tends to work in the COS role.

Eight interviewees (of 13) described a substantial degree of initiative in either proposing or job-crafting their COS role from within the organization. One interviewee said:

[My CEO is] a serial entrepreneur who started and created fifteen businesses and built and sold them. He has never had a Chief of Staff, our company has never had a Chief of Staff… I volunteered to help him when one of our executive leaders left the organization, I offered to help them with that function, which I had never worked in before. And he liked how I did it. And the fact that I just jumped in there and said, "I'm going to do this." And we were successful in working in

Table 3. Descriptive Results of Survey Data ($n = 108$).

		Percent of Sample
Gender	Woman	76.6%
	Man	23.4%
Race/Ethnicity	Asian	8.3%
	Black or African American	4.6%
	Hispanic or Latino	8.3%
	Native Hawaiian or Other Pacific Islander	0.9%
	White	70.4%
	Unknown	7.4%
Job Level (self-described)	C-suite	36.3%
	Top management or executive/VP, but not C-suite	34.1%
	Director	20.9%
	Manager	7.7%
	Independent contributor	1.1%
Direct Manager	CEO/President/Owner	63.0%
	Other C-suite position (e.g., COO, CFO, CTO)	16.3%
	Other senior/vice president position	9.8%
	All Else	10.9%
Previous Job Category	Director	19.6%
	Executive Assistant	19.6%
	Program/Product/Project/General Manager	19.6%
	Manager/Director/VP of Operations	17.4%
	Analyst	3.3%
	All Else	20.7%
Highest Education Level	Associates	1.9%
	Bachelors	48.6%
	Masters	38.3%
	Doctoral	4.7%
	All Else	6.5%
Recent Change in CEO?	Yes	42.6%
	No	29.6%
	Did not respond	27.8%

that function. … So he created the [COS] job for me and offered it to me.

Another important insight comes from the highly varied job histories of COSs. A substantial proportion of profiles observed in our LinkedIn data were previously directors, managers, VPs, and even more senior executives. Moreover, a surprising 36.3% of survey respondents self-classified their COS role as a member of the C-suite. This raises a fascinating question about how the COS is perceived by TMT members within the organization and others outside of the organization, and how that subsequently impacts their influence and job functions. As an example, one of our interviewees described the difficult

process of convincing the other C-suite members that they *should* be in the room and part of their team meetings.

Additionally, gender emerged as a key distinguishing demographic characteristic of people in COS roles. Unlike most C-suite positions (Larcker & Tayan, 2020; McKinsey & Company, 2020), the proportion of women or female-presenting individuals in LinkedIn and survey data were far greater (53.2% and 76.6%, respectively) than the proportion of typical TMT members identifying as a woman (e.g., 20–25%). Moreover, several significant relationships between gender and other variables point to the unique nature or experience of women COSs in terms of prior work history, current job level, number of subordinates, among others; though, notably, there was much less variation in job tasks across genders. A substantial amount of TMT research focuses on gender diversity (e.g., Mensi-Klarbach, 2014; Russen et al., 2021), with some particularly focusing on reducing barriers for women in executive leadership (e.g., Beeson & Marie Valreio, 2012; Hogue & Lord, 2007). The large proportion of COSs identifying as a woman can be interpreted both positively and negatively. For example, considering the COS as a vitally important role in strategic leadership, might the COS career path be a doorway through which we might see better women representation in corporate executive leadership? On the other hand, at present, the COS role does not appear to receive nearly as much recognition or value as other TMT members. One interviewee specifically attributed this to gender: "There's a lot of changes in how we treat each other, inclusiveness, women versus men, all these things are changing around us. And I work for a bunch of old White guys. It's been a bit of a challenge, getting them to realize the importance of emotional intelligence." Future research could also identify if the COS role is largely comprised of women because of gender biases and stereotypes, and if so, how those can be addressed.

Finally, the interviews provided important insights on the competencies involved in succeeding as a COS. In general, COSs tend to be people who enjoy variability and unpredictability in their work, are humble and willing to work behind-the-scenes, and are generalists with a wide range of capabilities across many different functional areas. When asked about the knowledge, skills, and abilities required to be an effective COS, interviewees identified the "need to be able to deal with ambiguity… flexibility, adaptability, being able to multitask… you do need to wear many hats", "having the capacity to be a leader, but leading from behind… low ego is a big part of it, but also being able and willing to step into a role of authority", and "have the ability to be both strategic and tactical… I don't have a problem seeing the big picture, but then saying, 'Okay, but we need to do that thing here. Precisely there.' So I can go back and forth." These individuals indicated enjoyment of the variety in their work and

that each COS job is unique depending on their CEO and the organization. Given that much COS work happens behind-the-scenes to facilitate connections and create synergy across many different organizational functions, these trends suggest that COSs need a unique set of competencies, notably different from those required to be a specialist C-suite member overseeing a specific function of the organization.

Future Research Directions

In this paper, we have provided initial evidence about who COSs are, and our data further suggest that there are multiple pathways through which COSs seem to matter, by influencing other central strategic actors and by directly and indirectly impacting group- and organizational-level strategic leadership processes. Given the stated purpose of this study as a launching pad for additional research on the COS role, we have developed our findings and implications into a broad-scoped research agenda which might guide future exploration. Below, we lay out four questions for research, with the recognition that these ideas are by no means comprehensive; we imagine that scholars interested in this population would pursue variants and additional pathways beyond what is presented here.

1. What impact does the COS have on the attention and psychological states of CEOs?

Some of the main tasks and roles that COSs in our data self-reported were as follows: acting as a sounding board and trusted advisor to the CEO, representing the CEO and their agenda, ensuring that the CEOs' initiatives are progressing, and gathering facts. Additionally, all of our interviewees suggested that trust between the COS and CEO is essential, especially in their role as a confidant; many of our interviewees suggested that they were the/one of the most trusted people in the CEOs orbit who could be relied on as an ally amidst challenges. Together, our data paints a picture of the COS being able to drastically affect the attention, and psychological states, of the CEO, which in turn are likely to lead to differential strategic-level outcomes. Moreover, are there COS behavioral skills, experience, or psychological factors that lead to differential influence of the CEO? Our interviews have highlighted humility and ambidexterity as important characteristics for a COS, which suggest a viable avenue for research, presuming that there is real variability between COSs on these characteristics. Perhaps these factors are part of the trust equation that appears so critical between the COS and CEO; if so, then how is this trust built and maintained?

2. What is the COS influence on TMT and organizational processes and outcomes?

Our data collectively suggest a number of pathways through which COSs might influence TMT process variables. COSs appear to regularly set agendas for meetings (including executive meetings across the TMT) and work across different functional areas to ensure alignment and progress on strategic initiatives. In addition, our interview and survey participants suggested that they often do behind-the-scenes tasks involving the TMT (e.g., soliciting ideas and opinions in private, gathering dissenting viewpoints, and smoothing over disagreements). Collectively, these tasks suggest a substantial influence on TMT processes. At a high level, we propose that the COS is likely to be an important actor related to TMT behavioral integration (Hambrick & Mason, 1984) and related subconstructs around team processes (Neely et al., 2020). Moreover, this effect might even extend to the strategic leadership system of TMT interaction with the board of directors (Luciano et al., 2020). This raises the question of how TMT processes might change after the introduction of a COS. Perhaps a COS can compensate for a lack of TMT behavioral integration by playing a bridging role between TMT members. Given the extensive research already conducted on TMT members and their functions, it will be vital for COS research to identify exactly how the COS fits into what we already know about TMT functions, even as the role appears to often reside in an ambiguous space.

Downward Processes. In addition to their likely substantial influence on TMT interactions and processes, their role is also relevant across and down internal organizational boundaries. Our data suggest that the COS is involved in ensuring that strategic priorities are progressing across and down the organization. In addition, they may be particularly useful at gathering unvarnished facts and perspectives. When a CEO solicits opinions and perspectives from employees, the resulting input may be censored much more than to a COS. We heard this idea several times in our interviews—that the COS is almost always comfortable working down the organization, and that employees down the hierarchical chain are more likely to feel comfortable interacting with a COS than a CEO. How exactly does the COS go about doing this, and what training or coaching could be developed to assist COSs in effectively fulfilling such a function? What specific cascading processes might the COS affect?

Organizational Outcomes. The influence of COSs on TMT processes and organizational processes leads to the question of their unique value-add (or subtraction) for firm-level outcomes. Our primary data comes directly from COSs themselves—meaning that we have not triangulated the view they have of their own role versus how the CEO views the role versus how other TMT members view the role versus how others inside (and perhaps outside) view the role, especially as it pertains to their contribution to firm outcomes. Such explorations may include 360-degree surveys of CEOs, other TMT members, board members, and even middle management to determine specifically what value-add the COS role offers, how, and for whom.

Examples of prior studies that have taken this approach include Kunisch et al.'s (2022) investigation of the Chief Digital Officer and Menz and Scheef's (2014) investigation of the Chief Strategy Officer.

3. Who hires a COS and under what conditions?

Future research may consider what types of firms or organizational conditions (e.g., size, industry, organizational structure, and current TMT structure) have, seek out, or need a COS. Parris (2015) estimated that 68,000 people held a corporate COS title in 2015, and it has been estimated that approximately 189,000 new COS roles will be created in the US from 2018 to 2028 (https://www.zippia.com/chief-of-staff-jobs/trends/). These figures suggest continued and (likely growing) widespread adoption—but by which organizations and under what conditions? Our data point to some early signs that this matters, such as the finding that older and larger organizations tended to employ COSs with more experience and more education.

In their comprehensive tracking of C-suite roles over multiple decades, Alvarez and Svejenova (2022) have suggested that senior executive and C-suite structures and roles are added, shifted, and subtracted as an adaptation to changing environments and needs. If this is the case, what is the perceived need that was not being previously met without a COS? Or, asked differently, who does the work of a COS when an organization does not have one? Does their work overlap with a typical COO role in smaller and younger organizations? These are not insignificant questions for future research. It might also be an issue of mimicry within an industry or with CEO previous experience—where one might imagine that companies and CEOs who are adjacent to or experienced with government and military operations (where the COS role has a much longer and wider history) may be more likely to structure for a COS role. Scholars might examine or consider these possibilities by collecting data from a variety of different types of organizations and/or following organizations longitudinally over time to capture how changes in the organization facilitate or diminish the need for a COS.

4. What are the career predictors and long-term outcomes for COSs?

The human capital and demographic characteristics examined in our work here provide some information on where COSs have come from and who they are (age, gender, etc.). However, our data do not answer the question of what human capital, social capital, background experiences, and other characteristics are necessary to succeed in the COS role. Given that the role is typically newer, often crafted specifically for and by the role holder, and appears to change over time (all evidenced by our survey and interview data),there is still much to be understood about COS networks, learning within the role, and better vs. worse types of preparation for the role. Moreover, many of our interviewees noted that they had to prove their legitimacy, particularly with other TMT members. This was especially true when the focal COS was the first person in the organization to hold this role. For example, one interviewee shared how early on in the role, other TMT members would ask why she was present in the leadership team meetings, but over time, TMT members learned the advantages of running things by her before they reached the CEO; over time, she "earned her seat at the table." Thus, does this mean that successful COSs require a set of background experiences and individual difference characteristics that uniquely facilitate working in an ambiguous, rapidly-changing, and often overlooked role? It would be interesting for scholars in the future to compare the knowledge, skills, abilities, and other characteristics required of a successful COS to those of other TMT members.

Moreover, in addition to having earned credibility and authority over repeated interactions, the shape of the COS role and ultimate success of an incumbent may be dependent on the CEOs structural decisions and communication about the role to others within the organization, especially the TMT. The COS's proximity to the CEO is likely to confer a certain degree of reflected authority and legitimacy (as discussed previously), but the CEO may also vest a certain degree of "surrogate authority" to the COS and clearly communicate this authority to the TMT and others in the organization. The degree to which the CEO vests surrogate authority in the COS may be particularly important in situations where the COS acts as a proxy for the CEO—but does so among TMT members who are "ranked" higher than them in terms of functional specialization and role clarity (i.e., finance, accounting, and technology), pay, and prestige. Together, this rich interplay of earned, proximal, and surrogate authority is intriguing ground for future COS research and may extend to further possibilities for broader scholarship around TMT interactions and processes.

Equally intriguing are questions about the future job movements and prospects of COSs. Do they often follow a CEO when that CEO moves organizations? What kinds of roles come next for a COS? It is not clear what the next functional step would be within the TMT or C-suite, as the role utilizes many skills and is not within a certain function/area of expertise. Moreover, our LinkedIn data show that only 13% of COSs' immediate prior job was a COS, suggesting a small number of individuals for whom the COS role is their long-term career trajectory. It seems doubtful to us, based on our sense of the role, that a COS would typically and immediately move to an established C-suite/TMT role (at least in large organizations), though we acknowledge that this is a question that should be determined with data.

COSs as a Source of Data. Although not a formal future research question, it is worth noting some additional insights generated by our study. Specifically, our findings in this

Table 4. Summary of Potential Future Research Questions About Chiefs of Staff.

1. What impact does the COS have on the attention and psychological states of CEOs?
2. What is the COS influence on TMT and organizational processes and outcomes?
3 Who hires a COS and under what conditions?
4. What are the career predictors and (long-term) outcomes for COSs?

study suggest that COSs are likely to help provide a more complete picture of strategic leadership processes and outcomes. Yet importantly, they may also provide valuable insight as a source of data. COSs see and work far and wide across the organization, they interact regularly with the CEO and the entire TMT, and they understand strategy and strategic priorities, making them an intriguing and unexamined source about others and the organization. More specifically, as one example, the COS likely has valuable and first-hand insight about the CEO's attention and focus, frame of mind, thought process, and strategic plans, providing more directly sourced data than much of upper echelons/strategic leadership research (Bourgoin & Harms, 2024) (Table 4).

Conclusion

Our qualitative and quantitative findings in this study suggest that the COS role, and those who hold it, may influence a host of actors (CEO, TMT, and employees), processes (especially TMT processes), and outcomes (e.g., execution and progress on strategic goals)—all of which form the organization's strategic leadership fabric. Through our results, and by outlining several broad avenues for future research, we hope this article inspires scholars to envision and enact a further rich set of investigations with both scholarly and practical implications.

Declaration of Conflicting Interests

The authors declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Funding

The authors received no financial support for the research, authorship, and/or publication of this article.

ORCID iD

Steven Zhou 🆔 https://orcid.org/0000-0003-0710-7065

Notes

1. Following the recommendations of an anonymous reviewer, to further assess if there were hidden algorithms in the LinkedIn search function that might have impacted sample selection, we conducted a validation test by having three independent coders with substantially different personal networks (one current PhD student with small business work experience, one PhD graduate with HR work experience, and one tenured business professor) who searched LinkedIn PRO Sales Navigator using the same search parameters. Each coded the first 200 profiles for the key variables in our study. One-way ANOVAs and Fisher's exact tests conducted on each of the key variables, across the three coders, were all non-significant. This suggests that our sample of 2,500 LinkedIn profiles was not likely to have been biased in a way that influenced the study variables.
2. Recall that frequency was rated on a 7-point scale and importance was rated on a 5-point scale.
3. Recall that, to reduce burden of survey fatigue, participants were randomly assigned 15 out of the 43 task statements to rate. This column indicates the total number of participants who rated each task.

References

Ahearn, K. K., Ferris, G. R., Hochwarter, W. A., Douglas, C., & Ammeter, A. P. (2004). Leader political skill and team performance. *Journal of Management*, *30*(3), 309-327. https://doi.org/10.1016/j.jm.2003.01.004

Alvarez, J. L., & Svejenova, S. (2022). *The changing C-suite: Executive power in transformation.* Oxford University Press.

Arthur, W. Jr, Edwards, B. D., Bell, S. T., Villado, A. J., & Bennett, W. Jr (2005). Team task analysis: Identifying tasks and jobs that are team based. *Human Factors*, *47*(3), 654-669. https://doi.org/10.1518/0018720054577860087

Ateş, N. Y., Tarakci, M., Porck, J. P., van Knippenberg, D., & Groenen, P. J. (2020). The dark side of visionary leadership in strategy implementation: Strategic alignment, strategic consensus, and commitment. *Journal of Management*, *46*(5), 637-665. https://doi.org/10.1177/0149206318811567

Athanasopoulou, A., Smets, M., Risi, D., & Morris, T. J. (2020). Lonely at the top? CEO sensemaking in the boardroom. *Academy of Management Proceedings*, *2020*(1), 1-40. https://doi.org/10.5465/AMBPP.2020.20409abstract

Barnes, L. Y., Lacerenza, C. N., & Volpone, S. D. (2023). Becoming a right-hand partner: How lower-power employees heedfully challenge organizational leaders. *Academy of Management Journal*, *67*(3), 704-736. https://doi.org/10.5465/amj.2021.1390

Beeson, J., & Valerio, A. M. (2012). The executive leadership imperative: A new perspective on how companies and executives can accelerate the development of women leaders. *Business Horizons*, *55*(5), 417-425. https://doi.org/10.1016/j.bushor.2012.05.002

Bourgoin, A., & Harms, P. D. (2024). "It's not the CEOs, it's us": On the challenges of CEO research and a call for deeper engagement. *Group & Organization Management*. Advance online publication. https://doi.org/10.1177/10596011241254150

Bromiley, P., & Rau, D. (2016). Social, behavioral, and cognitive influences on upper echelons during strategy process: A literature review. *Journal of Management*, *42*(1), 174-202. https://doi.org/10.1177/0149206315617240

Burke, C. S. (2004). Team task analysis. In N. Stanton, A. Hedge, K. Brookhuis, E. Salas, & H. Hendrick (Eds.), *Handbook of human factors and ergonomics methods* (pp. 552-561). CRC Press.

Cahill, T. F. (2006). *CEO sensemaking in turbulent environments* [doctoral dissertation, The George Washington University]. ProQuest Dissertations Publishing, 3199634.

Carmeli, A., & Schaubroeck, J. (2006). Top management team behavioral integration, decision quality, and organizational decline. *The Leadership Quarterly*, 17(5), 441-453. https://doi.org/10.1016/j.leaqua.2006.06.001

Ciampa, D. (2020, May-June). The case for a chief of staff. *Harvard Business Review*. https://hbr.org/2020/05/the-case-for-a-chief-of-staff

Cohen, D. B., Hult, K. M., & Walcott, C. E. (2016). White House evolution and institutionalization: The office of chief of staff since Reagan. *Presidential Studies Quarterly*, 46(1), 4-29. https://doi.org/10.1111/psq.12249

Deployable Training Division. (2020). *Insights and best practices focus paper: Chief of Staff (COS) roles and functions at joint headquarters. Deployable Training Division.* Retrieved from https://www.jcs.mil/Portals/36/Documents/Doctrine/fp/cos_fp2nd_ed.pdf

DeWahl, J. (2019, April 29). The Chief of Staff role in Silicon Valley. *Chief of Staff Network*. https://medium.com/chiefofstaffnetwork/the-chief-of-staff-role-in-silicon-valley-182eb93e636e

Gifford, S. (1998). *The allocation of limited entrepreneurial attention*. Springer Science & Business Media.

Hambrick, D. C., & Abrahamson, E. (1995). Assessing managerial discretion across industries: A multimethod approach. *Academy of Management Journal*, 38(5), 1427-1441. https://doi.org/10.2307/256864

Hambrick, D. C., & Cannella, A. A. (2004). CEOs who have COOs: Contingency analysis of an unexplored structural form. *Strategic Management Journal*, 25(10), 959-979. https://doi.org/10.1002/smj.407

Hambrick, D. C., & Mason, P. A. (1984). Upper echelons: The organization as a reflection of its top managers. *Academy of Management Review*, 9(2), 193-206. https://doi.org/10.2307/258434

Hambrick, D. C., & Quigley, T. J. (2014). Toward more accurate contextualization of the CEO effect on firm performance. *Strategic Management Journal*, 35(4), 473-491. https://doi.org/10.1002/smj.2108

Hannan, M. T., & Freeman, J. (1977). The population ecology of organizations. *American Journal of Sociology*, 82(5), 929-964. https://doi.org/10.1086/226424

Heavey, C., & Simsek, Z. (2017). Distributed cognition in top management teams and organizational ambidexterity: The influence of transactive memory systems. *Journal of Management*, 43(3), 919-945. https://doi.org/10.1177/0149206314545652

Hogue, M., & Lord, R. G. (2007). A multilevel, complexity theory approach to understanding gender bias in leadership. *The Leadership Quarterly*, 18(4), 370-390. https://doi.org/10.1016/j.leaqua.2007.04.006

Krause, R., Roh, J., & Whitler, K. A. (2022). The top management team: Conceptualization, operationalization, and a roadmap for scholarship. *Journal of Management*, 48(6), 1548-1601. https://doi.org/10.1177/01492063211072459

Kunisch, S., Menz, M., & Langan, R. (2022). Chief digital officers: An exploratory analysis of their emergence, nature, and determinants. *Long Range Planning*, 55(2), 101999. https://doi.org/10.1016/j.lrp.2020.101999

Larcker, D. F., & Tayan, B. (2020). *Diversity in the C-suite: The dismal state of diversity among Fortune 100 senior executives.* Rock Center for Corporate Governance at Stanford.

Lubatkin, M. H., Simsek, Z., Ling, Y., & Veiga, J. F. (2006). Ambidexterity and performance in small-to medium-sized firms: The pivotal role of top management team behavioral integration. *Journal of Management*, 32(5), 646-672. https://doi.org/10.1177/0149206306290712

Luciano, M. M., Nahrgang, J. D., & Shropshire, C. (2020). Strategic leadership systems: Viewing top management teams and boards of directors from a multiteam systems perspective. *Academy of Management Review*, 45(3), 675-701. https://doi.org/10.5465/amr.2017.0485

Marcus, B. (2018, January 4). Are you ready to become chief of staff? *Forbes*. https://www.forbes.com/sites/bonniemarcus/2018/01/04/are-you-ready-to-become-chief-of-staff

Marrone, J. A. (2010). Team boundary spanning: A multilevel review of past research and proposals for the future. *Journal of Management*, 36(4), 911-940. https://doi.org/10.1177/0149206309353945

McKinsey,& Co. (2020). *Women in the workplace 2020*. McKinsey & Company and LeanIn Org New York.

Mensi-Klarbach, H. (2014). Gender in top management research: Towards a comprehensive research framework. *Management Research Review*, 37(6), 538-552. https://doi.org/10.1108/MRR-03-2013-0066

Menz, M., & Scheef, C. (2014). Chief strategy officers: Contingency analysis of their presence in top management teams. *Strategic Management Journal*, 35(3), 461-471. https://doi.org/10.1002/smj.2104

Neely, B. H., Lovelace, J. B., Cowen, A. P., & Hiller, N. J. (2020). Metacritiques of upper echelons theory: Verdicts and recommendations for future research. *Journal of Management*, 46(6), 1029-1062. https://doi.org/10.1177/0149206320908640

Niebauer, M. (2018, September 26). What is a chief of staff and when do you need one? *The Bridgespan Group*. https://www.bridgespan.org/insights/library/careers/chief-of-staff-role

Ocasio, W. (1997). Towards an attention-based view of the firm. *Strategic Management Journal*, 18(S1), 187-206. https://doi.org/10.1002/(SICI)1097-0266(199707)18:1+<187::AID-SMJ936>3.0.CO;2-K

Parris, T. (2015). *Chief of staff: The strategic partner who will revolutionize your organization*. Tyler Parris Coaching LLC.

Russen, M., Dawson, M., & Madera, J. M. (2021). Gender diversity in hospitality and tourism top management teams: A systematic review of the last 10 years. *International Journal of Hospitality Management*, 95, 102942. https://doi.org/10.1016/j.ijhm.2021.102942

Samimi, M., Cortes, A. F., Anderson, M. H., & Herrmann, P. (2022). What is strategic leadership? Developing a framework for future research. *The Leadership Quarterly*, 33(3), 101353. https://doi.org/10.1016/j.leaqua.2019.101353

Smith, W. K., & Tushman, M. L. (2005). Managing strategic contradictions: A top management model for managing

innovation streams. *Organization Science*, *16*(5), 522-536. https://doi.org/10.1287/orsc.1050.0134

Sterling, J. (2003). Translating strategy into effective implementation: Dispelling the myths and highlighting what works. *Strategy & Leadership*, *31*(3), 27-34. https://doi.org/10.1108/10878570310472737

Wang, X. (2024). Does CEO temporal myopia always lead to firm short-termism? The critical role of CEO optimism and perceived opportunity costs. *Journal of Business Research*, *180*, 114739. https://doi.org/10.1016/j.jbusres.2024.114739

Wang, G., Holmes, R. M. Jr, Oh, I. S., & Zhu, W. (2016). Do CEOs matter to firm strategic actions and firm performance? A meta-analytic investigation based on upper echelons theory. *Personnel Psychology*, *69*(4), 775-862. https://doi.org/10.1111/peps.12140

Zhou, S., & Klimoski, R. J. (2023). Creating the interpersonal context for enabling organizational agility: The underappreciated role of the chief of staff. In *Senior leadership teams and the agile organization* (pp. 166-186). Routledge.

Author Biographies

Steven Zhou recently completed his PhD in Industrial & Organizational Psychology from George Mason University, studying under Dr. Stephen Zaccaro and Dr. Philseok Lee. He previously received a BA in Industrial & Organizational Psychology and an MA in Religion from Pepperdine University. He also has four years of full-time applied work experience in human resources, data analytics, and non-profit management along with consulting experience in leadership development and data analysis.

Nathan J. Hiller is professor in the College of Business and executive director of the Center for Leadership at Florida International University, where he oversees strategy and programs for almost 11,000 person-hours of executive development programming per year. His primary research interest is in the psychology of executive leadership. He is co-editor of the book *Senior Leadership Teams and the Agile Organization*, with Stephen Zaccaro and Rich Klimoski.

Stephen J. Zaccaro is a professor of psychology at George Mason University, Fairfax, Virginia. He has written over 150 journal articles, book chapters, and technical reports on leadership, group dynamics, and team performance. He has authored one book and co-edited seven others on the topics of organizational agility, organizational leadership, leader development, multiteam systems, cyber-security, and occupational stress. He is also an experienced leadership development consultant with executives and managers from private industry as well as from the public and military sectors.

Lauren N. P. Campbell is a doctoral candidate in George Mason's Industrial-Organizational (I-O) Psychology program. She received her BS in Psychology from Penn State, and MS in Industrial Organizational Psychology from University of Central Florida, under Shawn Burke's advisement. She is currently working under Dr. Stephen Zaccaro, where she is conducting research focusing on multiteam systems (MTSs) and leadership development.

Renee McCauley is a second year PhD student in George Mason's Industrial-Organizational (I-O) Psychology program studying with Dr. Yijue Liang. Her current projects explore how the same bystander intervention actions are perceived based on the identity of the actor. Prior to her time as a graduate student at Mason, she was second-in-command of a scale-up process serving company.

Tyler Parris is a Hudson-certified executive coach, author, and former corporate chief of staff. He founded chiefofstaff.expert, the first and largest international online community for people in chief of staff roles, with 1,500 users. His professional career has spanned operations management at Intellectual Ventures, program management at Advaiya, Inc., technical editing at Microsoft, and computer networking in the United States Marine Corps. His writing and editing credits include technical publications, book reviews on military and political subjects, a poem, and his first book, "*Chief of Staff: The Strategic Partner Who Will Revolutionize Your Organization*". His insights have been featured in publications like *Harvard Business Review, MSNBC, The Washington Post, and Fast Company*.

Richard J. Klimoski is an emeritus professor of psychology and management at the Costello College of Business at George Mason University, Fairfax Virginia. His teaching and research have centered on managing the human side of work organizations, especially through effective leadership, leadership development and the involvement of work teams, including senior leadership teams. He has held several leadership positions while at Mason including serving as the director of the Applied Cognitive and Industrial/Organizational PhD programs, the associate dean of Arts and Sciences for Outreach and the dean of the College of Business.

Appendix A. Task Statements from Survey

1. Overseeing processes
2. Clarifying decision rights and responsibilities
3. Gathering facts
4. Convening internal stakeholders
5. Managing personnel
6. Managing the CEO's schedule and agenda
7. Buffering difficult relationships
8. Refereeing disputes between company employees
9. Firing personnel
10. Acting as an "enforcer" for the CEO
11. Acting as a sounding board for the CEO's ideas
12. Advising on high-level strategic or urgent matters
13. Collecting, organizing, consolidating, and cleaning organization-related data from internal sources
14. Analyzing complex data sets to make meaning and frame issues for the principal executives or leadership team
15. Playing devil's advocate, questioning assumptions, and eliciting dissenting viewpoints to prevent groupthink
16. Implementing the top strategic initiatives of the CEO
17. Working with key leaders to drive strategy and implementation

18. Ensuring cross-functional accountability for execution against objectives
19. Convening important external stakeholders (e.g., stockholders)
20. Speaking to external stakeholders (e.g., media, regulators)
21. Standing in for, negotiating, and/or making decisions on behalf of the CEO with internal stakeholders (e.g., employees, leadership team)
22. Standing in for, negotiating, and/or making decisions on behalf of the CEO with external stakeholders (e.g., stockholders, potential investors, media)
23. Maintain performance analytics scorecards
24. Monitor and allocate the CEO's time spent across activities
25. Maintain relationships with lower-level employees
26. Foster a positive organizational culture
27. Track and manage progress on key strategic projects and initiatives
28. Identify "influencers" who are critical to the success of the CEO's agenda
29. Engaging in succession planning to transition from one CEO to the next
30. Manage financial budgets for C-suite leadership
31. Determine the agenda items for C-suite and board meetings
32. Facilitate effective meetings by designing the structure of meetings in advance, framing discussions and leading meetings, and synthesizing information and agreements for follow up after the meeting
33. Drafting or advising on communications from the executive or leadership team to internal stakeholders (e.g., other employees)
34. Drafting or advising on communications from the executive or leadership team to external stakeholders (e.g., stockholders, potential investors, media)
35. Managing the principal executive's leadership brand beyond the organization (e.g., speaking engagements, nonprofit work, board involvement)
36. Plan and execute ad hoc leadership/development events, like cross-functional workshops, tiger teams, ad hoc offsites, etc., including defining key themes & outcomes
37. Create governance venues and processes across the enterprise or divisions to address new/unfolding realities not covered by existing policies and governance venues
38. Draft policies for unfolding realities not covered by existing policies
39. Supports principal executive on transformational change efforts like restructuring or large special projects, investigating merger & acquisition options, data gathering/analysis or information on specific deals that are on the exec's table, and feasibility studies before taking decisions to a board
40. Manage or support leadership transitions, like the introduction of new C-suite leaders or department heads or their departures
41. Temporarily backfill departed leaders on an interim basis
42. Manage direct reports in support of Chief of Staff duties
43. Partner with principal exec, CFO, GC, CHRO, others to ensure regulatory compliance on a variety of fronts (e.g., business continuity planning, diversity and anti-harassment training, auditing, anti-bribery and corruption policies)

Appendix B. Interview Questions

1. What are your major responsibilities in your role as Chief of Staff?
2. What are the key skills, characteristics, and other attributes that make someone a good Chief of Staff?
3. How do your responsibilities differ from other top management team members in your company?
   (a) Who are the other members of the top management team?
   (b) How do you work with and interact with other members of the top management team on a regular basis, if at all?
   (c) Is there overlap between your role and someone else's on the leadership team? If so, please describe.
4. Thank you for explaining what your role entails. I'd like to shift gears a little and ask you to think about your prior work history before you became a Chief of Staff. What was your journey to becoming Chief of Staff? What were some of your previous positions or experiences, and how did they bring you to this role?
   (a) What prior jobs or experiences prepared you the most for becoming a COS?
   (b) Now that you are a COS, what prior jobs or experiences do you wish you had obtained before becoming a COS that would've helped prepare you for the role?
5. How did you end becoming a Chief of Staff at this company? Who hired you? How long have you been the Chief of Staff?
6. How has your perception of your responsibilities changed, if at all, from when you first began as Chief of Staff?
7. Overall, what would you say is the main value-add for having a Chief of Staff?
   (a) Specifically for facilitating the CEO and top management team's interactions?
   (b) Broadly for the organization's performance?