

# Bridging the Gap from Tactical to Strategic: A Program Manager's Roadmap to Chief-of-Staff

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## ABSTRACT

The Chief of Staff (CoS) role has emerged as a strategic career path for Program Managers seeking to elevate their impact and influence within organizations. This article explores the Program Manager's journey to executive leadership through the lens of the CoS role, examining the key responsibilities, skills, and mindset required for success. By leveraging their expertise in strategic thinking, stakeholder management, and effective communication, Program Managers can successfully transition into the CoS role and drive organizational alignment and success. The article provides insights into the challenges and opportunities of the CoS position, offering guidance for Program Managers looking to make a lasting impact on their organizations and advance their careers to the executive level.

**Keywords:** Chief of staff, Program manager, Executive leadership, Strategic thinking, Stakeholder management, communication, Organizational alignment, Career advancement, Leadership skills, Strategic partnership, Growth mindset

## Introduction

Organizations are increasingly recognizing the value of strategic leadership and the critical role that Program Managers play in driving successful outcomes. As Program Managers navigate their career trajectories, many aspire to elevate their impact and influence, seeking opportunities to shape organizational strategy and contribute to executive decision-making. One increasingly popular career path for experienced PMs is transitioning into the role of a Chief of Staff (CoS).

Traditionally associated with political and military contexts, the Chief of Staff role has become increasingly prevalent in the corporate world, particularly in the technology industry. According to a survey conducted on the Chief of Staff Network, the number of CoS positions in the United States has grown by over 50% in the past decade<sup>1</sup>.

The CoS role serves as a strategic partner to executive

leadership, bridging the gap between high-level vision and operational execution. For Program Managers, transitioning into a Chief of Staff position represents a unique opportunity to apply their skills and expertise in a more strategic capacity, influencing organizational direction and driving transformative change.

However, the path from Program Manager to Chief of Staff is not always straightforward. It requires a shift in mindset, a broadening of skill sets, and a deep understanding of the strategic context in which the organization operates. Program Managers must learn to navigate complex stakeholder relationships, communicate effectively with executive leadership, and align program outcomes with overarching organizational goals.

In this article, we will explore the Program Manager's path to executive leadership through the lens of the Chief of Staff role. We will examine the key competencies and experiences that position Program Managers for success in this role, the challenges and opportunities that come with the transition,

and the strategies for effectively navigating the Chief of Staff position to drive organizational impact. By understanding the evolving landscape of the Chief of Staff role and the value that Program Managers can bring to this position, readers will gain insights into a compelling career path that offers the potential for significant growth, influence, and strategic leadership. We will also provide actionable insights and recommendations for aspiring and current Chiefs of Staff looking to enhance their impact and value within their organizations.

## 2. Understanding the Chief of Staff Role

The Chief of Staff (CoS) role has emerged as a critical position in many organizations, serving as a strategic partner to executive leadership. The CoS acts as a right-hand person to the executive, providing support, guidance, and oversight across various aspects of the organization<sup>1</sup>. The role encompasses a wide range of responsibilities, including strategic planning, project management, stakeholder engagement, and communication.

At its core, the Chief of Staff role is designed to enhance the effectiveness of the executive and ensure the successful execution of strategic initiatives. The CoS works closely with the executive to align priorities, manage competing demands, and drive decision-making processes. They serve as a trusted advisor, offering insights and recommendations based on a deep understanding of the organization's goals and challenges<sup>2</sup>.

### 2.1 Chief of Staff Role vs. Executive Assistant Role

The Chief of Staff (CoS) and Executive Assistant (EA) roles are often confused due to some overlapping responsibilities, but there are significant differences between the two positions. The Key Differences between Chief of Staff and Executive Assistant Roles:

**2.1.1. Strategic Focus:** The primary difference lies in the strategic nature of the CoS role. While EAs primarily focus on administrative tasks and managing the executive's day-to-day activities, the CoS takes on a more strategic role, working closely with the executive to develop and implement long-term strategies and initiatives.

**2.1.2. Scope of Influence:** The CoS has a broader scope of influence across the organization. They often work cross-functionally, collaborating with various departments and stakeholders to drive strategic projects and ensure alignment with organizational goals. In contrast, EAs typically have a more limited scope, primarily focusing on supporting the executive and their immediate team<sup>4</sup>.

**2.1.3. Decision-Making Authority:** Chiefs of Staff often have more decision-making authority compared to EAs. They are trusted advisors to the executive and are empowered to make strategic decisions and recommendations on behalf of the executive. EAs, on the other hand, generally have limited decision-making authority and primarily focus on facilitating the executive's decision-making process.

**2.1.4. Stakeholder Engagement:** CoS roles involve extensive stakeholder engagement, both internally and externally. They often represent the executive in meetings, communicate with senior leaders and board members, and manage relationships with key partners and clients. EAs, while they may interact with stakeholders on behalf of the executive, typically have a more limited engagement scope.

**2.1.5. Leadership and team management:** Chiefs of Staff

frequently lead and manage teams, particularly for strategic initiatives or special projects. They may have direct reports and are responsible for driving team performance and outcomes. EAs, in most cases, do not have direct reports and focus more on individual support to the executive.

While Chief of Staff and Executive Assistant roles may share some similarities, the CoS role is more strategic, has a broader scope of influence, and often involves leadership and decision-making responsibilities. Understanding these differences is crucial for organizations looking to establish or hire for a Chief of Staff position, ensuring clarity in expectations and optimal placement within the organizational structure.

### 2.2 Chief of Staff Network Leveling Framework

The Chief of Staff Network, a professional organization dedicated to supporting and advancing the CoS role, has developed a leveling framework that categorizes the position into five distinct levels based on the scope of responsibility and strategic impact<sup>3</sup>.

The five levels are:

**Level 1:** Associate Level- The CoS works as a Business Operations Associate with explicit direction from the principal and is responsible for executing small projects. Generally, the CoS at Level 1 is not involved in any strategic decisions which have an organization wide impact.

**Level 2:** Junior Manager- The CoS at Level 2 works with some independence with the focus being on taking the workload off the principal's plate. The CoS managed small projects and is expected to implement strategic decisions made.

**Level 3:** Senior Manager- The CoS at Level 3 is expected to expand Principal's influence on cross functional projects. The CoS provides inputs on strategic decisions and brings in strong program management experience. Participates in OKR decisions for the principal's organization.

**Level 4:** Director Level - At Level 4, the CoS takes on a more strategic role, working closely with the executive to develop and implement long-term vision and strategy. They are responsible for leading high-impact initiatives, managing cross-functional teams, and ensuring alignment across the organization. The CoS acts as a Thought Leader for the Principal and influences the Partner and the Partners' vision across cross functional stakeholders. The CoS also has a team reporting to them that executes special projects for the principal.

**Level 5:** Executive Partner- Level 5 represents the highest level of the CoS role, where the individual serves as a true executive partner. At this level, the CoS is deeply involved in shaping the overall direction of the organization, providing strategic counsel to the executive, and driving transformative change<sup>3</sup>.

This article focuses specifically on Level 4 and Level 5 Chief of Staff roles, which are characterized by their significant strategic influence and ability to drive organizational change (Figure 1).

### 2.3. Organizational chart placement for chief of staff

The Chief of Staff role typically reports directly to the executive they support, such as the CEO, President, or other C-level leaders. In the organizational chart, the CoS position is often placed in close proximity to the executive, reflecting their strategic partnership and direct reporting line.

Role Level	Level 1	Level 2	Level 3	Level 4	Level 5
Leading Executive	Associate	Senior Associate/Manager	Manager/Principal Manager	Director	Executive
Alternate Title	Member's Associate, Generalist, Business Operations Associate	Generalist, Business Managers, Manager	Member's Associate, Generalist, Business Operations Manager	Director, Office of the CEO, Head of Business Operations	CEO, COO, VP Strategic
Relationship to Principal	Operates with little independence	Operates with some independence	Operates with some independence	Operates mostly independently	Operates independently
Primary Director	Explicit direction from Principal	Regular check-ins with Principal	Regular/occasional check-ins with Principal	Little operational oversight, but occasional check-ins with Principal	No operational supervision
Scope of Role	Focuses on small projects or tasks	Manages small projects	Own assigned projects end-to-end	Focuses on, and manages projects by managing, some substantial work	Strategic Owner
Decision Making Capabilities	Not involved in strategic decisions	Improves strategic decisions	Input on strategic decisions	Key input on strategic decisions	Key senior & decision maker
Influence / Leadership	Strong relationships, but low influence across organization	Progressive manager by influence primary with Principal	Thought partner to Principal, manager by influence across Senior Leadership team	Key thought partner across leadership team, manager by influence across organization	Direct Management, strategic leadership
Demonstrated Skills	Attention to detail, strong work ethic, and super engineer	Strong operational and strategic experience, ability to drive business insights and operational improvement	Strong project management, coordination & negotiating experience	Department leading in team & interacting with senior stakeholders or cross-functional projects	Expert in stakeholder management and Senior Leadership team facilitating & influencing
Responsibility Examples	Ensures the executive team is working on the most important items for the company	Create resource updates, pitch decks, speeches, conference presentations, and presentations on behalf of the CEO	Initiate and guide the COO process across the company	Run special projects that are urgent and important	Serve as a proxy for the CEO by attending meetings in place of the CEO and making decisions on the CEO's behalf
Down Reports	None	None	Visible in EA	Office of the CEO	Departments
Exit Path	Principal position or operations roles, HR/Project Ops	Founder, Business Operations or Strategy roles, Business School	Founder, General Manager, Sr. Associate in Venture Capital	Senior Leadership: General Manager, VP-level Operations, Strategy, Corp Dev, Paycom, etc	Other exec roles, leading smaller organizations

Figure 1: Chief of Staff Leveling Framework<sup>3</sup>.

The specific placement of the CoS role in the organizational chart can vary depending on the organization’s structure and the executive they support. In some cases, the CoS may report to the Chief Operating Officer (COO) or another senior executive, depending on the focus of their role and the organization’s needs. The CoS may be an Individual Contributor (IC) role or may have a team reporting to the CoS that works on Strategic Initiatives (Figure 2).

Here’s an example of how the CoS role might fit into an organizational chart:

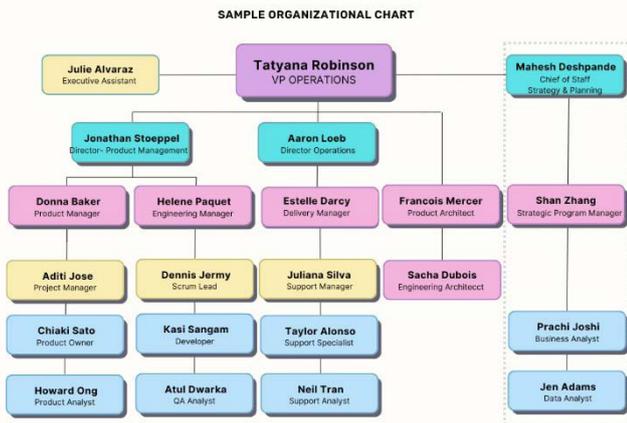


Figure 2: Sample org chart with a chief of staff role

In this example, the Chief of Staff reports directly to the VP of Operations and works alongside other C-level executives. The CoS is considered at a Director Level (Level 4) in this example and the CoS has a team reporting to him for strategic initiatives or special projects.

**2.4. Critical Skills for a successful Chief of staff**

To excel in the role of Chief of Staff (CoS), individuals must possess a diverse set of skills that enable them to navigate the complex landscape of organizational leadership. Here are five critical skills that are essential for success in the CoS role:

**2.4.1. Developing strategic vision:** One of the primary responsibilities of a Chief of Staff is to help shape and articulate the strategic vision of the organization. This requires the ability to think strategically, anticipate future challenges and opportunities, and align the organization’s resources and priorities accordingly<sup>1</sup>. The CoS must work closely with their primary executive to define long-term goals, identify strategic initiatives, and develop actionable plans to achieve those objectives.

As Eric Nehrlich, a Chief of Staff to VP of Products at Google, explains, “In the fall, my VP and I were responsible for figuring out the plan for the team for the next year. We would come up with questions to elicit a multi-year vision for the team and deliver framing materials such as metrics decks to drive that discussion. I drove much of this process each year, especially in framing the challenges that the team was facing in upcoming years. This would conclude with a leadership offsite to discuss and agree upon the upcoming year’s strategy”<sup>5</sup>.

**2.4.2. Leading tactical operations:** While the CoS role is primarily strategic in nature, it also involves overseeing tactical operations to ensure the smooth functioning of the organization. The CoS must be able to manage complex projects, monitor progress, and identify potential roadblocks or issues<sup>5</sup>. They are responsible for coordinating across different teams and departments, ensuring that everyone is working towards common goals and objectives.

**2.4.3. Driving stakeholder communications:** Effective communication is a critical skill for any Chief of Staff. The CoS must be able to communicate effectively with a wide range of stakeholders, including executives, employees, customers, and external partners<sup>6</sup>. The style of communication must be adapted based on the audience and their priorities. When dealing with executives, the focus should be on outcomes and how they can contribute to the organization’s success. At the operational level, the CoS must be able to provide a clear narrative of the work performed, analysis conducted, and outcomes achieved.

As Scott Amenta, who used to be CoS @Spring, highlights: “One of the primary functions of a CoS, having developed strong relationships with key stakeholders, is to be a conduit of information across teams. This might take the form of developing company-wide OKRs and getting buy-in and support for the processes or running point on cross-functional projects that require 3 or more teams with no clear leader. In both instances the CoS supports the organization by freeing information bottlenecks, helping quickly growing teams get visibility outside their functional silos”<sup>7</sup>.

**2.4.4. Being a thought leader:** The Chief of Staff serves as a thought leader and advisor to both the executive and the broader organization. They are expected to have a deep understanding of the industry, market trends, and best practices, and to provide insights and recommendations based on that knowledge<sup>5</sup>. The CoS acts as a sounding board for the executive, offering objective opinions and challenging assumptions when necessary. They also provide guidance and mentorship to the team, fostering a culture of innovation and continuous improvement.

**2.4.5. Prioritizing new initiatives:** Finally, the Chief of Staff plays a critical role in prioritizing and overseeing new initiatives that are important to the executive but may not have clear ownership within the organization. The CoS must be able to assess the strategic importance of these initiatives, allocate resources accordingly, and ensure their successful execution<sup>7</sup>. This requires strong project management skills, as well as the ability to navigate complex organizational dynamics and competing priorities.

The role of Chief of Staff demands a unique combination of strategic thinking, operational expertise, effective communication, thought leadership, and initiative management. By mastering these critical skills, CoS can effectively support

their primary executive, drive organizational success, and position themselves as invaluable assets to their organizations.

### 3. The Program Manager's Journey to a Chief of Staff

The journey from Program Manager (PM) to Chief of Staff (CoS) is a natural progression for many professionals seeking to expand their influence and impact within an organization. Program Managers possess a unique set of skills and experiences that make them well-suited for the Chief of Staff role.

For Program Managers looking to transition into the role of Chief of Staff, the journey requires a shift in mindset and a focus on developing key transferable skills. While Program Managers possess a strong foundation in project management, communication, and leadership, the Chief of Staff role demands a more strategic and holistic approach to organizational success. Here are the top five transferable skills that Program Managers should focus on when transitioning into a CoS role:

**1. Strategic Thinking:** As a Chief of Staff, PM's will be expected to think strategically and contribute to the development of the organization's overall strategy. This requires the ability to analyze complex business challenges, identify opportunities for growth and improvement, and develop innovative solutions that align with the organization's goals<sup>8</sup>. Program Managers can leverage their experience in managing complex projects and stakeholder relationships to develop a more strategic mindset, focusing on the bigger picture and long-term objectives.

**2. Adaptability:** The Chief of Staff role requires a high degree of adaptability and resilience, as they will be navigating a constantly evolving landscape of priorities, challenges, and opportunities. Chief of Staff role requires the ability to adapt to changing priorities and navigate ambiguity. Program Managers who are used to working within defined project scopes and timelines must learn to be flexible and comfortable with uncertainty. As a CoS, PMs will need to quickly assess new situations, make decisions based on limited information, and pivot strategies as needed to support the executive's priorities<sup>9</sup>.

**3. Influencing skills:** Influencing without authority is a crucial skill for a Chief of Staff. Program Managers often may have direct authority over project teams, but as a CoS, they will need to influence and persuade stakeholders across the organization, including those at higher levels of seniority. Developing strong relationships, building trust, and communicating effectively are key to influencing outcomes and driving alignment<sup>9</sup>.

**4. Business Acumen:** To be an effective Chief of Staff, PMs must have a deep understanding of the business and industry in which your organization operates. Program Managers should focus on expanding their knowledge of financial metrics, market trends, and competitive landscapes. This business acumen will enable them to provide valuable insights and recommendations to the executive team and contribute to strategic decision-making<sup>11</sup>.

**5. Emotional Intelligence:** Emotional intelligence is a critical skill for a Chief of Staff, as the role involves managing complex relationships and navigating sensitive political dynamics. Program Managers must develop their self-awareness, empathy, and social skills to effectively engage with stakeholders, manage conflicts, and build consensus. As a CoS, you will need to be attuned to the emotional needs of your executive and team, providing support and guidance to foster a positive and productive work environment<sup>10</sup>.

In addition to developing these transferable skills, Program Managers must also undergo a mindset shift when transitioning into the Chief of Staff role. The CoS role requires a more strategic and proactive approach, rather than the reactive and tactical focus of many Program Manager positions. As a Chief of Staff, PMs must anticipate challenges, identify opportunities, and develop solutions that drive the organization forward. This requires a willingness to take risks, challenge the status quo, and think outside the box.

Moreover, the Chief of Staff role demands a high level of diplomacy and political savvy. Program Managers must shift their mindset from being task-oriented to relationship-oriented, focusing on building and maintaining strong relationships with key stakeholders across the organization. This involves understanding the political landscape, navigating competing interests, and finding common ground to drive consensus and alignment (**Figure 3**).



**Figure 3:** Skills for PMs to move into a CoS Role

The journey from Program Manager to Chief of Staff is one of growth, adaptation, and skill development. By focusing on strategic thinking, adaptability, influencing skills, business acumen, and emotional intelligence, Program Managers can position themselves for success in the CoS role. Embracing a proactive and relationship-oriented mindset, while leveraging their project management expertise, will enable Program Managers to make a seamless transition and contribute to the success of their organizations at the highest levels.

### 4. Conclusion

As organizations navigate the complexities of strategic planning, operational efficiency, and stakeholder management, the Chief of Staff serves as a vital link between executive leadership and the broader organization. For Program Managers seeking to elevate their careers and make a more significant impact, the Chief of Staff role presents a compelling opportunity to leverage their skills and experience in a new and challenging capacity.

Program Managers considering a transition to the Chief of Staff role, it is essential to understand the unique challenges and opportunities that this position presents. While many of the skills developed as a Program Manager are transferable to the Chief of Staff role, there is also a significant shift in mindset and approach required. Program Managers must learn to think more strategically, communicate more influentially, and lead with a broader perspective on the organization's goals and priorities.

To succeed as a Chief of Staff, Program Managers must focus on developing key skills such as strategic thinking, stakeholder management, communication and influence, problem-solving and decision-making, and adaptability and resilience. They must also be proactive in seeking out new learning opportunities and staying abreast of industry trends and best practices.

The journey from Program Manager to Chief of Staff is not always an easy one, but it can be incredibly rewarding for those who are willing to embrace the challenge. As a Chief of Staff, they have the opportunity to make a significant impact on their organization, working closely with executive leadership to drive strategic initiatives and deliver results. They also have the chance to grow and develop as a leader, building new skills and expertise that can serve you throughout your career.

For organizations looking to establish or strengthen the Chief of Staff role, it is important to recognize the value that this position can bring to the table. By providing strategic support and guidance to executive leadership, driving cross-functional alignment and collaboration, and ensuring operational efficiency and effectiveness, the Chief of Staff can help organizations navigate the complex challenges of today's business landscape and achieve their goals.

As we look to the future, it is clear that the role of the Chief of Staff will continue to evolve and grow in importance. As organizations become more complex and fast-paced, the need for strategic leadership and effective coordination across functions will only become more critical. For Program Managers who are up for the challenge, the Chief of Staff role represents an exciting opportunity to take their careers to the next level and make a lasting impact on their organizations.

The journey from Program Manager to Chief of Staff is one that requires dedication, strategic thinking, and a commitment to continuous growth and development. It is a path that offers significant rewards, both in terms of personal and professional fulfillment, and in terms of the value and impact that individuals can bring to their organizations. As the business world continues to evolve and change, the role of the Chief of Staff will only become more critical, and those who are able to successfully navigate this transition will be well-positioned to lead their organizations into the future.

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