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THE

Office of the CEO

PLAYBOOK

1ST EDITION

INTRODUCTION

Welcome to the first-ever edition of the Office of the CEO playbook.

At Cedar, our mission is to help 1 million CEOs and their C-suite teams let go and do more of the things that matter. Our goal is to help executives turn into fast and fearless leaders who find freedom from blockers and busywork.

We help CEOs and top executives hire a Chief of Staff, build an Office of the CEO and implement C-suite operating systems to save time and grow faster.

This project builds on the momentum from our Chief of Staff playbooks which have been downloaded by more than 5,000 leaders hailing from 91 countries, working at from top companies and organizations such as OpenAI, McKinsey & Company and the US Navy.

Our success has inspired us to delve deeper into an expanded subject area which noticeably has a lack of industry standards and best practices: the Office of the CEO.

Over the past year, **we've conducted primary research by speaking with hundreds of Office of the CEO professionals**, including CEOs, Founders, Chiefs of Staff, Executive Assistants, and Directors of Executive Communications. We've also connected with C-suite executives, board members, investors and executive coaches to gain additional understanding of the CEO Office.

From these conversations, we've published novel insights via hundreds of posts on LinkedIn and dozens of newsletters on Beehiiv. We're pleased to present the following The Office of the CEO Playbook, 1st Edition, including 62 pages of content, covering **Office of the CEO 101, Strategy, Planning, Team, Enablement and Execution.**

After you've read our playbook, you may be asking what's next in your Office of the CEO journey. Share this playbook **here**, subscribe to our weekly newsletter **here**, and attend upcoming Cedar events **here**. Get in touch **here** if you'd like to explore Office of the CEO coaching, training or consulting services for your organization. Finally, stay tuned for industry-defining Office of the CEO research and benchmarking reports in 2025.

A word from our CEO & Founder

I am so proud of what we have accomplished together over the past three years in helping CEOs, Chiefs of Staff and Executive Assistants build strong Offices of the CEO around the world.

Our thought leadership has impacted thousands of leaders at Fortune 1000 companies, top startups, government organizations, multinational conglomerates, private equity firms and venture capital firms. Our experienced team of Office of the CEO consultants have delivered leadership advisory services and implemented executive operations solutions to help dozens of CEOs and top executives save time and grow faster.

Despite all our progress, **we have discovered a noticeable lack of best practices, standards and data for the Office of the CEO, which makes budgeting, ROI analysis and benchmarking extremely difficult. CEOs aren't clear on what quantifiable benefits they will receive if they invest in the Office of the CEO.** This makes additional spend understandably questionable, given our current macroeconomic environment. The result is under-supported and overworked CEOs, Chiefs of Staff and Executive Assistants, on the brink of burnout.

To that end, we have published version 1 of an Office of the CEO maturity model to establish clear benchmarks and standards. **We will also start regularly collecting data and publishing groundbreaking research on Offices of the CEOs around the world, allowing CEOs to compare their own Office of the CEO to others.** We will share our findings at live events, hosted by our corporate partners.

As we look ahead, our goals are ambitious. With the support of our community, we are poised to expand our services, improve our outreach and strengthen our network. This includes growing our team, strengthening our finances and delivering even more impact to leaders across six continents.

I can't thank you enough for your help and support so far. Together, we will create a world where 1 million CEOs and their C-suite teams become fast and fearless leaders.

Mackenzie Lee
Cedar CEO & Founder

Connect with me on LinkedIn

How to use this playbook

For **CEOs, top executives, board members and investors**, start with Chapter 1 (Office of the CEO 101), Chapter 2 (Office of the CEO Strategy) and Chapter 4 (Office of the CEO Team).

For **Chiefs of Staff and Executive Assistants,** you may read the chapters in succession from 1 to 6.

Please note that the following Office of the CEO practices and insights can vary depending on type of organization and stage of company. For example, a non-profit Office of the CEO will be different from a Fortune 1000 company Office of the CEO. The same holds true for a Series A startup Office of the CEO that has just received funding when compared to a Series F startup Office of the CEO that is preparing for IPO.

Finally, in the spirit of continuous improvement, please send any feedback our way. In no way have we written about every aspect of the Office of the CEO, and we welcome suggestions on what to include in the next edition.

Acknowledgements

Thank you to the hundreds of leaders that have offered their time and insights to contribute to this Office of the CEO playbook. We are pleased to include expert tips and best practices, collected from the following executives from top companies and organizations from around the world:

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In a world of executive busywork and blockers, CEOs must strive to become fast and fearless leaders. **We give CEOs the freedom to do more things that matter.** We help them save time and grow faster by hiring a Chief of Staff and building a world-class Office of the CEO.

OUR OFFICE OF THE CEO SERVICES

- Executive Coaching
- Assessments & Benchmarking
- Executive Search
- CEO Operations
- Performance Management
- Special Projects
- Succession Planning
- Retreats & Offsites

OUR TRACK RECORD

120+
combined years of experience

1,000+
C-suite research and coaching sessions

15%
Average revenue increase

5,000+
Global eaders engaged

2x
Faster speed to execution

100,000+
C-suite minutes saved

LEADERS WE'VE IMPACTED

accenture OpenAI citi salesforce Deloitte. HSBC Palantir PPPL logitech

We are the world's only consulting firm that specializes in serving the Office of the CEO. Reach out or visit **www.CedarChief.com** to learn more.

CONTACT US

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CHAPTER 1

Office of the CEO 101

1.1 What is the Office of the CEO?

The Office of the CEO is the team of people working toward a common goal: **to maximize the impact of the CEO.** Foundational team members include the CEO, their Chief of Staff, and their Executive Assistant. Strong Offices of the CEO follow well-defined processes and leverage tools specific to CEO operations.

*Subscribe to our newsletter **here** for more exclusive insights and strategies on building a powerful Office of the CEO.*

EXPERT TIP

"Explore the nuances of the Office of the CEO across different industries, including for-profit, corporate, tech, nonprofit, higher education, and government sectors."

Jordan Gadd
Chief of Staff, Heluna Health
Nonprofit, Healthcare

1.2 Top 7 benefits of an Office of the CEO

Dear executives: Are you trapped in meetings? Do you have a never ending workload? Are your best leaders quitting? Are you missing your growth targets?

Here's our recommendation to get back to feeling on top of your game: Build your Office of the CEO. It's an investment in time and energy, but the ROI makes it worth it. We've seen ROI ranges upwards of 25x (Source: Cedar research).

The top 7 Office of the CEO benefits include a **high impact CEO, strong C-suite teams, clear mission and vision, improved cross-functional collaboration, better operational efficiency, strong culture and sustainable growth.**

1 High impact CEO

Maximize your impact with your Office of the CEO, which can include your Chief of Staff, Executive Assistant, Director of Communications and Strategy Manager. Your team is dedicated to making you shine both internally and externally in front of customers, employees, prospects, investors and board members.

2 Strong C-suite team

Your Office of the CEO introduces discipline and rigor into your day-to-day, so you become a role model for your C-suite team. Your CEO Office also defines clear protocol for C-suite meetings, decisions and investments to ensure your executive team comes together at the right moments and efficiently uses their time.

3 Improved cross-functional collaboration

Your Office of the CEO promotes cross-functional collaboration by bringing together the right people, at the right time, with the right tools. The result is less complexity, less risk and a better chance at reaching your desired goals, together.

4 Better operational efficiency

Your executive office has a continual eye on company health through the use of targeted KPIs and dashboards. Regular business reviews spark insightful conversations on how to drive better performance and operational efficiency across your enterprise.

5 Sustainable growth

Your CEO Office helps you achieve sustainable growth for yourself and your company. You avoid personal burnout, since your executive office team has your back. Your organization also avoids scaling too fast, since you have strong operational systems that reduce risk, manage change and prevent overreach.

6 Clear mission and vision

The Office of the CEO clarifies and upholds your vision and mission as the CEO. They can also act on your behalf to champion and amplify your CEO message both inside and outside your organization. With a strong CEO communications team, you can feel confident that almost everyone in your company can repeat your core vision and mission, backwards and forwards.

7 Strong culture

Everyone wants to work in a place that has a strong operating model with talented leaders, headed in the right direction. If you can unlock the 6 items above, the natural result will be a strong culture, fully enabled by your Office of the CEO. You have a team that is committed to executing towards an inspiring vision and can rally together to achieve ambitious goals.

EXPERT TIP

"The Office of the CEO is a crucial hub for organizational innovation and strategic agility, hosting special projects like fundraising initiatives and confidential experiments. This environment fosters creativity and continuous learning, acting as an incubator for high-potential ideas that can be rapidly tested and implemented without the limitations of traditional corporate structures."

Patricia de Leon
Chief of Staff, Embiggen Group
Private Company, Tech

Get in touch to discuss how we can help you build a powerful Office of the CEO that will elevate your leadership, streamline operations, and drive sustainable growth.

GET IN TOUCH

1.3 6 surprising benefits of the Office of the CEO

You may know about the standard benefits for the Office of the CEO, but do you know about its hidden benefits? Here are CEO benefits that you may not have considered:

Less stress

Your Office of the CEO can handle a significant amount of your current workload. You also have a proper team to rely on during times of crisis. The result: your stress levels are lower.

More family time

Less work means less meetings, which means more downtime with your loved ones, whether they are your partner, children, friends, parents or pets.

Healthier relationship with work

Instead of dreading the next board meeting or all hands, you **maintain a healthy relationship with work** by setting clear work boundaries and delegating more work to your team.

More fun on the job

Work becomes fun again as you get the opportunity to explore new ideas, grow into new markets, and become a better leader. Your not-so-fun work can be delegated to your team.

Guilt free vacation

Vacation truly feels like you are OOO, since you know you have a competent Office of the CEO in charge during your absence.

Longer life span

CEOs may be dying on the job more often than ever, but you can rest assured that you won't be decreasing your lifespace due to work-induced stress.

EXPERT TIP

"It can be lonely at the top. Creating an Office of the CEO ensures camaraderie and support the CEO may be missing from their previous roles leading up to the C-Suite."

Caroline Horvat
Chief of Staff to the CEO, JustFab,
Private Company, Tech & Retail

1.4 6 triggers that compel CEOs to build an Office of the CEO

1 You've received new investment and an ambitious growth mandate from your board

Take advantage of a capital injection by investing in yourself and earmarking funds towards your future Office of the CEO. You'll need dedicated support to exceed your growth targets.

2 You're a first time CEO

As a newbie CEO, consider hiring an experienced Office of the CEO team to show you the ropes and help you operate like a seasoned top executive.

3 You're new to your company

Promote from within to form your Office of the CEO, ensuring you take advantage of their pre-existing stakeholder relationships and deep institutional knowledge.

4 You've identified a critical C-suite skills gap

Plug a crucial skills, domain knowledge, or professional experiences gap on your leadership team by hiring the right talent in your Office of the CEO.

5 Your workload is too high

Avoid a work meltdown by delegating a significant chunk of your current task list to your new Office of the CEO team, so you can spend more time on strategic projects and building key relationships.

6 Your physical, mental and emotional health is taking a toll

Boost your wellbeing with a strong Office of the CEO team who looks after your holistic performance on a day to day basis.

1.5 8 warning signs that you need to build the Office of the CEO

Here are 8 CEO warnings signs that you need to build the Office of the CEO ASAP:

- You've missed growth targets since you're bogged down with operations
- Your C-suite team is fighting with each other
- You're on the verge of burnout
- Your team is frustrated because you're a decision bottleneck
- Your investors aren't pleased with your company strategy
- Your family is pleading that you spend more time with them
- Your task list is a mile long
- You're thinking about quitting your job

If you get close to any of the alarm bells listed above, it's time to build your CEO Office.

EXPERT TIP

"The biggest mistake I've observed CEOs make is failing to establish an Office of the CEO team early enough, which requires a dual commitment: support from the Executive Management Team and Board to invest in the CEO and the organization, and the CEO's commitment to hiring and training for this position quickly."

Joe Capraro
Chief of Staff, AT&T,
Public Company, Telecommunications

CEDAR INSIGHTS

Should you directly ask about the wellbeing of your principal?

82% **Yes**, wellbeing always matters

15% **Maybe**, wellbeing often matters

3% **No**, wellbeing is private

About four-fifths (82%) of Chiefs of Staff and Executive Assistants believe they should directly ask about their principal's wellbeing, while 15% are unsure, and only 3% think they should not. Wellbeing is increasingly important in today's hectic modern workplace.

LinkedIn Poll, n=152, Cedar Research, December 2023

Mackenzie Lee
CEO & Founder, Cedar
Office of the CEO Consultancy

1.6 6 CEO objections to building the Office of the CEO (and how to handle them)

It's not easy convincing a CEO with limited time, attention and budget to embark on a deeply personal journey to build their Office of the CEO.

Here are 6 common CEO objections to building the Office of the CEO and how to respond to them:

1 I don't have time

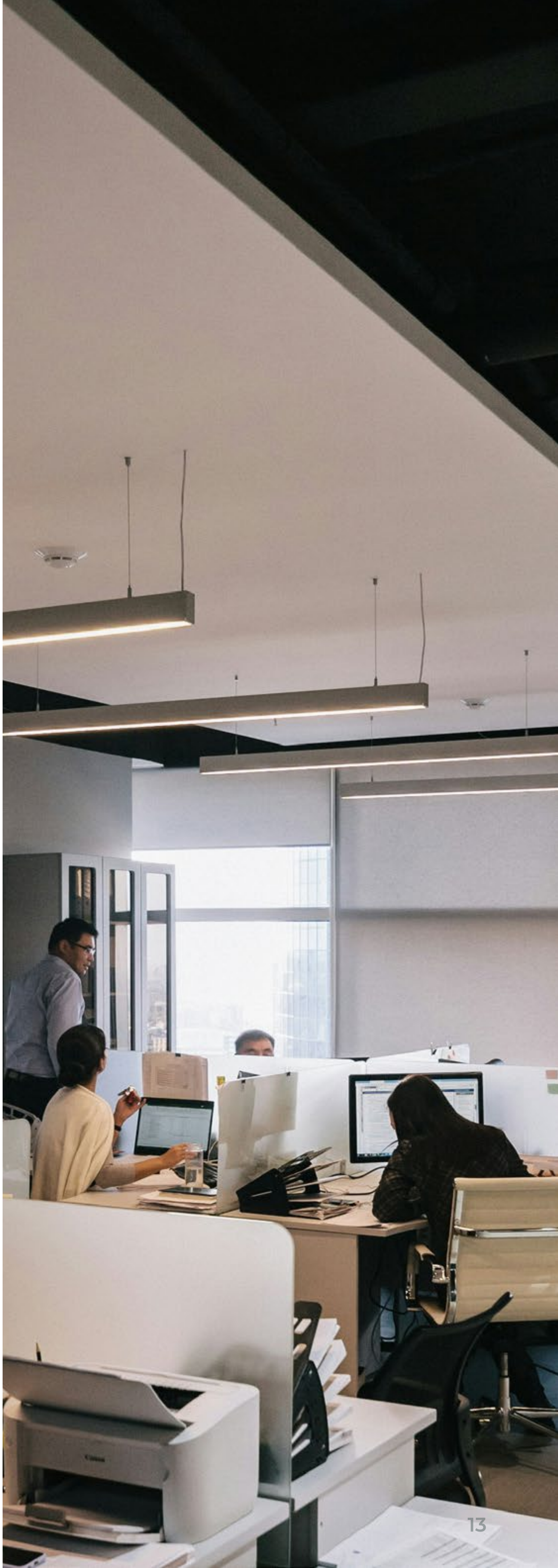
I'm glad you mentioned time. Time is one of the most precious assets for a busy CEO like you. The Office of the CEO is designed to give you more free time so you can spend it on your most strategic, high priority initiatives.

If you invest in building the Office of the CEO, your meeting load will decrease, your decision load will fall dramatically, and your blockers will be handled by your executive office.

You have much more time to grow your company faster by setting strategy, meeting with prospects and closing deals with your biggest customers.

2 I don't have the budget

Investing in the Office of the CEO will produce measurable returns that impact you, your leadership team and your entire company. The ROI for the Office of the CEO has been estimated at least 10x and as high as 25x, making this a worthwhile investment. The Office of the CEO can be a revenue generator, as it helps you close strategic sales as the CEO.



3 I have other competing priorities

Look, I get it. You have a million things on your plate as a CEO. But the Office of the CEO is meant to help you handle a heavy workload through delegation, de-escalation and prioritization. Your competing priorities will actually decrease because you have successfully delegated them to your leadership team.

4 It's going to take too long

A world-class Office of the CEO is not built overnight. It's a continuous improvement journey that spans a number of years. But instead of fixating on the end point, I'd ask for you to think about how we can start making improvements right now. I can immediately help you reduce your meetings, delegate your workload, and assign more responsibility to your C-suite team.

5 I don't know where to start

The best way to start is through a frank assessment of your current Office of the CEO. You can leverage Cedar's **Office of the CEO Maturity Model** to identify bright spots and polish opportunities for your executive office.

6 I don't have the right team to build the Office of the CEO

Building a strong Office of the CEO requires various skillsets in executive operations, strategic consulting, organizational design, executive search, process optimization, and change management.

Ask yourself who on your team has these skills and see if they are ready, willing and able to partner with you on building the Office of the CEO. If there's no one available, then it might be time to seek out an external consultant.

*Connect with Mackenzie Lee, Cedar CEO, on LinkedIn **here** to dive deeper into overcoming common CEO objections to building the Office of the CEO.*

CHAPTER 2

Strategy

2.1 Building a vision and mission for your Office of the CEO

It's shocking to hear how many CEO Office teams don't have a clear understanding of their ultimate end goals. By uniting your Office of the CEO team around a common vision and mission, you can point everyone in the right direction.

The best executive office teams write their vision and mission down and return to it regularly. So what's yours?

Your vision could focus on transforming your CEO into a fast and fearless leader that pioneers modern ways of working. A secondary piece of your vision could picture your CEO as a visionary and creative leader who pushes your industry to new heights and innovation.

Your primary mission could be to amplify your CEO's impact. A secondary mission could be to deliver against your company's KPIs.

But defining a vision and mission takes work. It takes thoughtfulness and care to define who your CEO wants to become and how to make that happen. Set aside some time to define your vision and mission for your Office of the CEO.

2.2 8 steps to develop your Office of the CEO roadmap

CEOs, Chiefs of Staff and Executive Assistants you're leaving millions of dollars on the table by neglecting your Office of the CEO. If you don't invest in your CEO Office, you'll never catch up to your competitors and become #1 in your market. And if you already are top dog, your position might be in jeopardy.

Instead, you'll be stuck with the same workload, the same decision fatigue and the same risk of burnout.

So what's the solution? A development roadmap for your Office of the CEO. This roadmap gives you hope to escape the abyss of CEO busywork, blockers and escalations while moving towards strategic growth and unlocking new markets.

Here are 8 steps to improve your roadmap:

1. Assess your current state Office of the CEO
2. Define your future state Office of the CEO
3. Define commonsense quarterly milestones to achieve your future state
4. Quantify the impact that each milestone will have on your CEO and company
5. Commit investment to developing your Office of the CEO
6. Assign an owner to the Office of the CEO roadmap
7. Execute workstreams to achieve each milestone
8. Report back your progress to the entire company every 6 months

Here are 8 examples of Office of the CEO roadmap milestones:

- Meeting protocol
- Decision protocol
- Escalation protocol
- Office of the CEO KPIs
- CEO-led customer success
- CEO-led sales
- Board prep optimization
- Project tracking

Remember, your Office of the CEO is a continuous improvement project that is never quite finished. So it's easier to leverage a roadmap to give you a structured path towards success by putting time, attention and dollars behind your efforts.

Once you have your roadmap milestones laid out in front of you, it's time to execute. Your new-and-improved Office of the CEO will power your executive team to reach new heights, stay competitive in the market, and capture new growth.

*Connect with Mackenzie Lee, Cedar CEO, on LinkedIn **here** to learn how investing in your Office of the CEO and creating a strategic roadmap can unlock millions in potential revenue and keep you ahead of the competition.*

2.3 Assess the maturity level of your Office of the CEO

Use our 60-factor Office of the CEO maturity model to assess and benchmark your executive office. **Our maturity model covers 5 measurement areas, including Strategy, Planning, Team, Enablement and Execution.** Here's how you use our model to complete an honest review of the current state of your CEO Office:

Step 1: Evaluation

Read each evaluative statement for each factor and select an answer from the following 6 point Likert scale: Always Agree, Strong Agree, Agree, Neutral, Disagree, and Strongly Disagree. For illustrative purposes, we've listed 10 sample evaluative statements below. You may check the boxes below.

STATEMENT	ALWAYS AGREE	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE
There is a clear vision and mission for our Office of the CEO.	☐	☐	☐	☐	☐	☐
There is a clear development roadmap to improve our Office of the CEO.	☐	☐	☐	☐	☐	☐
There is clear scope of what falls inside and outside of our Office of the CEO.	☐	☐	☐	☐	☐	☐
There are clear success metrics for our Office of the CEO.	☐	☐	☐	☐	☐	☐
There is thoughtful workload and headcount planning for our Office of the CEO.	☐	☐	☐	☐	☐	☐
There is a robust ROI model that calculates the value our Office of the CEO delivers to our C-suite and our company.	☐	☐	☐	☐	☐	☐
There are clear roles and responsibilities for all team members in our Office of the CEO.	☐	☐	☐	☐	☐	☐
There is a competitive total rewards package for all team members in our Office of the CEO.	☐	☐	☐	☐	☐	☐
There are clear and effective playbooks and checklists for all protocols in our Office of the CEO.	☐	☐	☐	☐	☐	☐
The tools that we use in the Office of the CEO actually drive productivity instead of holding us back.	☐	☐	☐	☐	☐	☐

Step 2: Ranking

For each factor, determine whether you are **Level 0 - Undefined up to L5 - Optimized** based on the table below.

EVALUATIVE STATEMENT SCALE	MATURITY LEVEL
Always Agree	**L5 -** Optimized
Strongly Agree	**L4 -** Controlled
Agree	**L3 -** Managed
Neutral	**L2 -** Defined
Disagree	**L1 -** Basic
Strongly Disagree	**L0 -** Undefined

Step 3: Heatmap

Based on the ranking above, identify areas where you might develop your Office of the CEO to achieve world-class status. Create a heatmap of bright spots and polish opportunities. Commit to improving your CEO Office with a development roadmap. When you are firing on Level 4 and Level 5 across multiple factors, you'll know you've built a world-class Office of the CEO.

Click here to check out our full Office of the CEO maturity model.

Interested in having our team run a personalized Office of the CEO assessment for your executive office?

GET IN TOUCH

2.4 Top 5 challenges for today's Offices of the CEO

Here are the top 5 challenges we've found facing Offices of the CEO: **24/7 Workload, Too Much Tech, Risky Business, Volatile Markets and Restless Teams.**

1 24/7 workload

The Office of the CEO is faced with an avalanche of meetings, loads of projects, and tons of inbound messages every day. The executive office is beholden to dozens if not hundreds of stakeholders including leaders, investors, board members, consultants, prospects, customers and strategic partners. Technology and cultural norms have shattered work boundaries, and the result is that the CEO, Chief of Staff and Executive Assistant are always on, at the risk of burnout.

2 Too much tech

Technology stacks have exploded and the result for leadership is disastrous if left unchecked. Too much tech in the Office of the CEO can become a distraction, where every notification, ping and alert takes away from the focus on growing the company and setting the vision for the future. Meanwhile, AI has been touted as a savior for increased workplace productivity but implementation has been haphazard and outcomes have been spotty.

3 Risky business

Business risk is increasing, not decreasing. The recent macro environment has seen scrambled supply chains, threatened political stability and decreased customer budgets. Planning and forecasting is harder than ever for the Office of the CEO. Risk is embedded in all aspects of the business: customer retention, employee retention, leadership succession, compliance, regulation, investor relations and insurance. Risk mitigation remains a focus for many executive offices.

4 Volatile markets

The markets have been anything but tranquil. Fluctuating stocks, runaway inflation and rising cost of capital have made the financial piece of running a business a headache. That said, investors and board members demand fiscal responsibility, responsible risk taking and, above all, growth. Offices of the CEO must thread the needle carefully, doing more with less while keeping enough money in the bank.

5 Restless teams

For the first time in history, the employee workforce spans five generations in the office. But differing perspectives abound on acceptable ways of working, company ethics, and the meaning of work itself have led to internal culture issues. The result is high turnover, lack of employee loyalty and vocal employees who demand change from within. The Office of the CEO must move the company culture in a positive direction and adapt with the times.

2.5 Leave your legacy with the Office of the CEO

Building an Office of the CEO is a guaranteed way to leave your legacy for years after you're gone.

After you've left, there will be a proper Executive Operations function left standing. There will be a high-functioning team with well-documented processes and procedures. And there will be the right relationships and tech tools in place that work seamlessly all in service of your CEO.

This lets your successor CEO, Chief of Staff or Executive Assistant pick up the reins with minimal disruption. Ultimately, you will continue to deliver an impact long after you have left. You will feel proud of the work that you've done and can reference it at any point in your future career.

Get out your construction tools, it's time to start building. **You will leave a long-lasting monument in place that ensures that you'll be remembered forever.**

CHAPTER 3

Planning

3.1 7 steps to set Office of the CEO KPIs, plus 5 examples

A message for the Office of the CEO: you are failing at your job if you don't quantify your impact for your CEO and your company. Office of the CEO KPIs are vital to make sure you are delivering the desired impact across your leadership team and the entire organization.

Without KPIs, then your executive office is seen just as a cost center. The rest of your organization, including your leadership team, remains skeptical of your impact and what you can deliver.

1. Get buy in with your CEO to set Office of the CEO KPIs
2. Review your organizational KPIs and company roadmap
3. Identify the drivers that help your CEO perform at their best
4. Codify your Office of the CEO KPIs in a live workshop with your CEO
5. Track, monitor and baseline your Office of the CEO KPIs over a few months
6. Benchmark, adjust and reaffirm your Office of the CEO KPIs
7. Deliver Office of the CEO KPI analysis and present back to the business

CEDAR INSIGHTS

47%

of Chiefs of Staff and Executive Assistants believe they don't have clear and measurable KPIs to quantify their impact. That's almost one-half of Office of the CEO professionals that can't measure their impact on the business.

(LinkedIn Poll, n=131, Cedar Research, August 2024)

Mackenzie Lee
CEO & Founder, Cedar
Office of the CEO Consultancy

Here are 5 examples of Office of the CEO KPIs:

TYPE	KPI	METRIC
Time	CEO time saved	Total # hours of CEO time saved by delegating tasks and meetings to the Office of the CEO or C-suite team
Growth	CEO sales	Total # CEO-to-prospect, CEO-to-customer and CEO-to-partner touchpoints; Total $ amount of deals originated by CEO; Total $ amount of deals closed by CEO support
Speed	CEO decision	Total # high impact CEO decisions made
Output	CEO special projects	Total # CEO special projects completed
Fun	CEO fun on the job	CEO satisfaction score on a scale of 1-5

3.2 9 steps to set up your Office of the CEO budget

If you don't budget for your Office of the CEO, your executive office will become second-class. You won't know where to make strategic investments to optimize your executive office and you'll fall behind your competition.

Here are 9 steps to set up a budget for your Office of the CEO:

1 Review your company's goals

Review your company KPIs and OKRs. Identify which ones that you can impact the most with your Office of the CEO. For example, you can boost company revenue by increasing CEO touchpoints with strategic customers, new prospects and GTM partners.

2 Review your CEO's goals

Review your CEO's KPIs and OKRs. Align all Office of the CEO activities to each goal. Say your CEO wants to establish a better social media presence to advance your company's brand recognition in the market. Your CEO Office can operationalize CEO posts and audience engagement on LinkedIn.

3 Quantify the impact of your Office of the CEO

Now that you have reviewed your CEO's and your company's KPIs and OKRs, it's time to quantify your Office of the CEO impact. For example, you can make the case that your Office of the CEO has increased topline revenue by 10%, reduced customer churn by 7% or accelerated execution of your product roadmap by 2x. Remember, the more successful you are at drawing a clear line between your CEO Office and your CEO and company goals, the more successful you will be in unlocking more budget.

4 Gather financial information and conduct spend analysis for your executive office

Collect historical data about the investments you have made in your Office of the CEO. Expenses can include headcount, training, coaching, team offsites, industry reports, technology, and consulting engagements. Complete spend analysis and create trend lines to understand the trajectory of your budget over time.

5 Define your development roadmap for the CEO Office

Next, it's time to lay out your Office of the CEO roadmap. This document defines future investments in your executive office based on previously identified development areas, such as Office of the CEO offsites, decision protocol, and board preparation.

6 Quantify your Office of the CEO expenses

With your Office of the CEO roadmap and historical expense analysis in hand, it's time to project next year's budget. Outline fixed costs (salaries), variable expenses (technology and bonuses) and one-time expenses (training, coaching, development and consulting).

7 Benchmark your budget against other Offices of the CEO

Reference industry reports and speak with Office of the CEO peers from similarly sized organizations in your sector to ensure your budget asks fall within standard industry ranges. If you're below industry standard, make note of how you can increase the budget. If you're above industry standard, define a solid business reason for the ask.

8 Gain budget approval from your CEO, CFO, and/or COO

Combine the elements above into a persuasive, compelling business case. These include your quantified Office of the CEO impact on your company and CEO, your defined Office of the CEO roadmap, and your proposed, industry-aligned budget. Follow your formal budget approval process and get sign off from your CEO, CFO and/or COO.

9 Monitor and track your Office of the CEO budget

As your next fiscal year unfolds, assign an owner to monitor and track your executive office's budget. Make sure you stay below budget and proactively raise spend issues as they come up.

3.3 6 steps to revamping your Office of the CEO ROI model

Your Office of the CEO ROI should be higher than 10x, otherwise you're doing something wrong. If you calculate an anemic ROI, the following may be true:

- You don't have clear success metrics.
- You don't measure KPIs well.
- You aren't taking into account your full impact across your CEO, your C-suite and your entire organization.

So how do you build a robust, accurate, and custom ROI model for your Office of the CEO?
Here's a 6 step how-to guide:

1 Define your Office of the CEO KPIs

Set common sense, impactful KPIs that capture the benefits your executive office delivers to your CEO, C-suite and company. These can include time, growth, speed, output and fun. Reference this playbook's section on KPIs at the beginning of this chapter.

2 Set your Office of the CEO budget

Define your budget for the next fiscal year by forecasting costs and planning investments to develop your Office of the CEO. Outline fixed costs (salaries), variable expenses (tech and bonuses) and one-time expenses (training, coaching, development and consulting). Reference this playbook's previous section on budgeting.

3 Quantify your impact over your fiscal year

Over the next 4 quarters, collect data against your previously defined KPIs. Use RAG status to keep yourself on track. Make sure you verify data quality by inspecting the sources of your data and doing quality control. Remember, if you put bad data in front of your CEO, you instantly lose credibility.

4 Track your budget over your fiscal year

Simultaneously, track your actual vs. expected spend in your Office of the CEO. If you are able to stay on budget, great; if you can stay below budget with a rainy-day-fund surplus, even better. Future coaching, training and development can be readily deployed since the funds have already been budgeted.

5 Calculate your Office of the CEO ROI

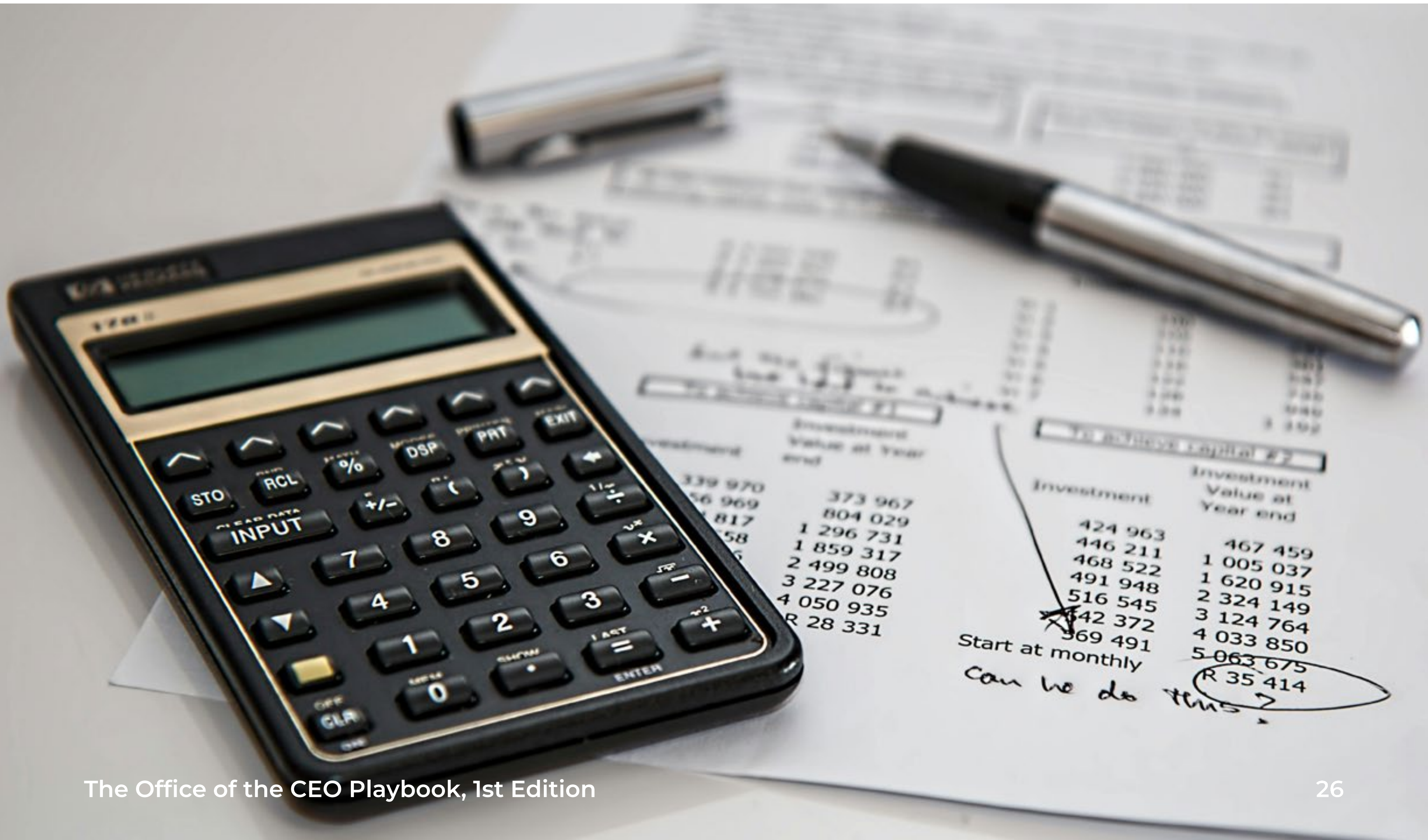
Once your fiscal year ends, it's time to analyze. Calculate the aggregated total business value for each KPI and divide by your actual Office of the CEO spend. Sanity check by referencing industry benchmarks and speaking to industry peers. We've seen ROI ranges from 10x-25x. Formally present your ROI analysis to your CEO, your C-suite, your entire organization and even your board.

6 Recalibrate your Office of the CEO ROI model

If your numbers seem out of line, it's time to recalibrate. Inspect your model by standardizing the inputs, calculations and outputs. This is an emerging discipline in the Executive Operations field, so it can feel more art than science. Bring back your recalibrated model to your stakeholders mentioned above.

Contact us to learn how to build a ROI model for your Office of the CEO and ensure you're achieving an impressive return on investment.

CONTACT US



3.4 The hidden risk of skipping Office of the CEO succession planning

Are you avoiding Office of the CEO succession planning? Caution, it's a huge risk to your business.

Business continuity, especially for your Office of the CEO, is vital.

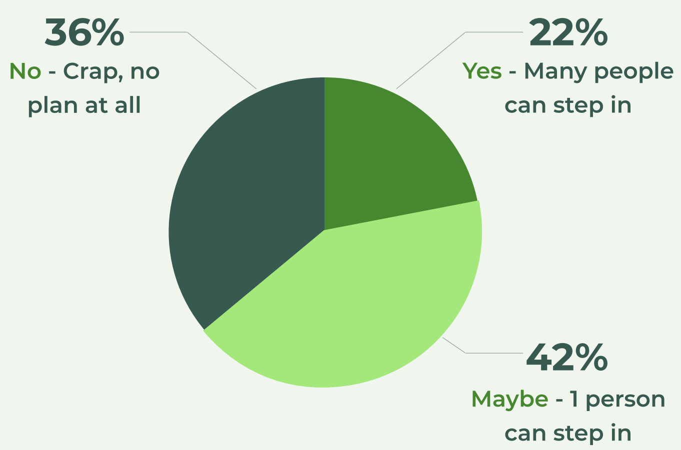
According to our research, about three quarters of CEO Offices do not have contingency plans for departures of key members such as their Chief of Staff or Executive Assistant.

The best organizations have an internal pipeline of star talent that they have been developing for years, ready to take over at a moment's notice. They can maintain business-as-usual with minimal disruptions.

The worst companies scramble when someone from their executive office departs, creating a huge void in leadership, structure and execution. Growth suffers, executive performance falls and milestones are missed.

CEDAR INSIGHTS

Chiefs of Staff, do you have a contingency plan if you suddenly need to leave your role?



Only 22% of Chiefs of Staff have a contingency plan in place if they suddenly need to leave their role, with multiple people ready to step in. 42% said only one person could take over, while 36% admitted they have no plan at all.

These statistics expose the business continuity risks in Offices of the CEO today, should the Chief of Staff need to leave the organization.

LinkedIn Poll, n=50, Cedar Research, August 2023

Mackenzie Lee
CEO & Founder, Cedar
Office of the CEO Consultancy

CHAPTER 4

Team

4.1 Top 5 team members found in the Office of the CEO

Who works in the Office of the CEO? Here are the most common titles of folks that you find in the CEO Office:

1. Chief of Staff
2. Executive Assistant
3. Office Manager
4. Director of Communications
5. Business Manager

Here are more titles that we've found on a less common basis:

1. Deputy Chief of Staff
2. Director of Strategy and Operations
3. Director of Continuous Improvement
4. Director of Innovation
5. Director of Customer Engagement

CEDAR INSIGHTS

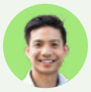
65%

Two-thirds of professionals **believe the Office of the CEO should consist of three key roles: the CEO, an Executive Assistant (EA), and a Chief of Staff.**

29%

Almost one-third **believe you can build the Office of the CEO with the CEO and an Executive Assistant or a Chief of Staff.** Most believe that an effective CEO Office must have at least 3 team members.

(LinkedIn Poll, n=283, Cedar Research, January 2024)



Mackenzie Lee
CEO & Founder, Cedar
Office of the CEO Consultancy

4.2 2 reporting structures to build your Office of the CEO org chart

Based on Cedar research, we have found 2 standard organizational structures for the CEO Office.

If the Office of the CEO team is small - a CEO, Chief of Staff and an Executive Assistant - then both team members report directly to the CEO. But if the CEO Office team is larger, then the Executive Assistant can report to the Chief of Staff. Ultimately, this structure helps the CEO reduce the number of their direct reports.

How this works: the Executive Assistant assumes the Head of Administration title and manages multiple Executive Assistants, Administrative Assistants and/or Personal Assistants. The Chief of Staff manages the Head of Administration, Deputy Chief of Staff, Communications Director and other specialized Executive Directors.

Remember, the fewer people in the Office of the CEO, the better. This streamlines workflow and reduces the complexity of information sharing across resources.

*Want to build a powerful Office of the CEO? Contact us **here** to learn how we can help you structure your executive office team for maximum impact.*

4.3 3 sets of internal Office of the CEO stakeholders

The Office of the CEO typically serves 3 sets of internal stakeholders: the CEO, the C-suite team and the company.

STAKEHOLDERS	DESCRIPTION
The CEO	The CEO's Office primary stakeholder is the CEO. The Chief of Staff, Executive Assistant and others can act as a force multiplier that extends the capabilities of their principal.
The C-Suite Team	The second set of stakeholders that the Office of the CEO serves is the executive team. In group leadership settings, the Chief of Staff can help run executive meetings and drive agendas to completion. She can also run strategic initiatives on behalf of the leadership.
The Company	Finally, the Office of the CEO serves the entire employee workforce at their company or organization. They deliver all hands, company reports and oversee employee engagement projects. They organize C-suite communications and executive meet-and-greets to connect leadership with the front line.

4.4 14 types of external Office of the CEO stakeholders

Winning CEOs grow huge networks across 14 types of external stakeholders, enabled by the Office of the CEO. We have grouped these personas into 4 relationship categories:

RELATIONSHIP CATEGORIES	DESCRIPTION
Commercial	Prospects, Customers, Strategic Partners
Advisory	Executive Coaches, Strategic Advisors, Management Consultants, Lawyers, PR Consultants
Governance	Board Members, Investors
Personal	Family Members, Personal Assistant, Personal Trainer, Driver

Commercial

The Office of the CEO enables the CEO to connect with prospects, customers and strategic partners. This boosts the revenue of the company by having the CEO originate more deals, close late-stage deals with a personal touch, and uncover white space with trusted partners. A specialized Customer Lead in the Office of the CEO looks after these relationships, but if this role does not exist, then the responsibility typically falls to the Chief of Staff.

Advisory

The CEO interacts with various advisors and consultants, including their executive coach, strategic advisors, management consultants, lawyers and public relations consultants. For example, the CEO might need to deliver a public speech or make an expensive acquisition decision that requires outside advice.

Governance

The Office of the CEO helps the CEO maintain exceptionally strong relationships with board members and investors. Typically the Chief of Staff prepares board decks and investor reports. They coach the CEO on how to run even more successful board and investor meetings. They collect action items and feedback from these governance meetings to incorporate back into the company's roadmap and overall strategy. In the end, the CEO better fulfills their obligations to the board and investors, while avoiding any major issues.

Personal

The Office of the CEO helps the CEO connect with family members, personal assistants, their driver, personal trainer, and more. The Executive Assistant mostly facilitates these relationships. This ensures the CEO's personal life is in order so that they can perform their best in professional settings.

EXPERT TIP

"Invest in relationships both within and around the CEO Office. Your greatest opportunity lies in coordinating the strengths of those supporting the CEO to optimize the Zone of Genius. Achieving this requires taking the time to connect with others on a human level."

Andrea Immenga
Chief of Staff, Fuse,
Startup, Tech

4.5 6 steps to define Office of the CEO roles and responsibilities

You're stepping on a landmine if you don't spell out Chief of Staff and Executive Assistant roles and responsibilities in the Office of the CEO.

You'll create miscommunication, resentment, and hurt feelings. You'll create a turf war where your executive office team jockeys for position and special favor. Your Chief of Staff and Executive Assistant might fight over a special project - like an employee engagement survey - instead of partnering together to get it done. The outcome will be less growth, less speed and less efficiency.

Here are 6 steps to define Office of the CEO roles and responsibilities:

1 Review goals for your company and your executive office

Start with your company goals: Are you looking to grow revenue? Bring a new product to market? Continue with your CEO Office goals: Do you want to improve your CEO's LinkedIn presence? Close more strategic customers with the CEO's touch?

2 Identify the jobs to be done and analyze workload

Next, you'll want to define the jobs-to-be-done for your Office of the CEO. This is the full scope tasks and deliverables for your executive offce, which can include inbox triage, board preparation, special projects, calendar management, strategic advisory and more. Analyze these jobs-to-be-done in terms of frequency, importance and time spent.

3 Identify your team's Zone of genius and Zone of Incompetence

Figure out the strengths and weaknesses of your team. Find out what they like doing and what they hate doing. Pro tip: you want to put your Chief of Staff and Executive Assistant in their Zone of Genius at least 80% of the time. Assign them work that they love doing that's squarely in their wheelhouse.

4 Analyze your existing job descriptions and identify gaps

Take a look at your current job descriptions and see where the gaps lie. Are your Chief of Staff and Executive Assistant going above and beyond their job descriptions (most likely)? Are you missing any jobs-to-be-done?

5 Document new and improved roles and responsibilities

Draw up a new set of job descriptions and commit to new roles and responsibilities assignments. Share the new job descriptions with every member of your Office of the CEO team (as well as your C-suite) for extra clarity.

6 Test and recalibrate your job descriptions

Test it out and see how it's working. Revisit your job descriptions every other quarter or so to continually adapt to the demands of your Office of the CEO. **Remember, in today's modern business world, the only constant is change.**

EXPERT TIP

"Ask your CEO to define their job in three bullet points. This exercise encourages the CEO to step back and assess their top priorities. As Chief of Staff, it then becomes your role to ensure the CEO stays focused on these key areas by streamlining their work and helping them avoid distractions from less consequential tasks."

Saniya Mittal
Chief of Staff, Everywhere,
Startup, Fashion

*Contact us **here** to learn more about how to clearly define roles and responsibilities for your Chief of Staff and Executive Assistant.*

4.6 Hiring internally vs. externally for your Office of the CEO

Do you hire internally or externally for the next member of your Office of the CEO? Here are the benefits for each method.

BENEFITS OF HIRING OFFICE OF THE CEO TALENT INTERNALLY	BENEFITS OF HIRING OFFICE OF THE CEO TALENT EXTERNALLY
1. You reduce the risk of a bad hire An Office of the CEO bad hire creates a really bad CEO headache. If your CEO already likes working with known superstar performers in your company, then you dramatically reduce the risk of a bad hire by recruiting internal high performers for the job.	**1. You reduce resentment among employees and managers** Your Office of the CEO search can be highly political if you aren't careful. If you don't manage the recruiting process right, then you might upset internal star performers who don't get the job. Managers also don't want to lose their top talent since it's a headache to find a replacement. Avoid this by hiring externally.

Internally

2. You save time

Chances are you need the person to start yesterday, so do you really have time to lose? If you've already identified exceptional internal talent, you can immediately start the internal recruiting process and avoid a months-long external candidate search.

3. You reduce hiring costs

Save money to spend on other Office of the CEO improvements. Instead of using an executive search firm, leverage your internal recruiters to achieve a cost-effective placement for your Office of the CEO.

4. You onboard faster

Onboarding is quick and easy. Your new internally-promoted Chief of Staff or Executive Assistant is already onboarded to your company's systems and familiar with your ways of working. They likely have pre-existing relationships with your C-suite team. Finally, they already possess extensive institutional knowledge of your company and domain knowledge of your sector.

5. You boost company loyalty & engagement

Promoting from within sends a strong signal to the company that you are investing in your existing workforce. What better way to build culture by hiring internal talent directly into your Office of the CEO?

Externally

2. You avoid a gap in your workforce

If you steal someone from within the organization, you leave a gaping hole. BAU won't be BAU unless you have a strong pool of talent that you can backfill. An external search for a new Chief of Staff or Executive Assistant avoids creating a talent gap in your company.

3. You dramatically expand the pool of applicants

Given the recent layoffs, you can take advantage of a flood of exceptional external talent by executing an external search. Many folks would kill to work in the Office of the CEO. It may be time to scoop up an exceptional hire.

4. You can shake up your culture

Culture can get ossified if you only hire from within. Shake up your ways of thinking and working in the Office of the CEO by hiring a dynamic external candidate. They can dramatically change the direction of your Office of the CEO, for good.

5. You bring a fresh perspective

Hiring externally brings new perspectives, reduces internal biases, and introduces a wealth of best-practice knowledge that can benefit the organization.

EXPERT TIP

“When hiring a new member for the Office of the CEO, it is essential to invest time and energy immediately after their hire to provide access, educate, collaborate, and ensure the new person is fully up to speed. Without this dedication, Chiefs of Staff and other members of the Office of the CEO may be left to figure things out on their own, resulting in them playing catch-up and often failing while guessing their way through tasks that have already been standardized.”

Confidential
Chief of Staff, Non-Profit, Education

EXPERT TIP

“Develop programs and initiatives that encourage continuous learning, including Professional Development Credits (PDCs) and workshops on emerging areas such as the use of AI or changes in regulatory frameworks. Facilitate mentorship and cross-practice collaboration to enhance knowledge sharing and skill development.”

Carl Morrison
Chief of Staff, modCounsel,
Private Company, Legal

4.7 Build CEO trust by starting small and delivering big

If you want to gain CEO trust fast, do this:

- Say what you’re going to do and then do it ahead of your self-imposed deadline.
- Set a high bar for quality and then exceed your CEO’s expectations.
- Raise difficult issues that need to be dealt with head on with proposed solutions.

That said, let’s not get ahead of ourselves. The easiest way to build trust in a new role in the Office of the CEO is to start small.

- Identify the smallest and most annoying things on your CEO’s task list and solve them 1 by 1.
- Report back what you did and see how your CEO’s mood changes for the better.
- Then and only then, seek permission to do bigger and better tasks.

The more trust you win, the bigger projects you are entrusted to handle.

For more insights on building trust quickly and effectively in the Office of the CEO, connect with Mackenzie Lee, Cedar CEO, on LinkedIn ***here.***

4.8 7 tips to prevent Office of the CEO burnout

1 Say no

Nip low priority requests in the bud by just saying no, especially to external stakeholders outside the Office of the CEO.

2 Delegate more

Pull up your task list and delegate non-mission critical work. Set a recurring calendar invite to help you complete this exercise on a regular basis.

3 Shut your laptop

It can wait til tomorrow. Set an alarm to shut your laptop by 9pm (or whatever time works best with your family) to make sure you have enough time to rest and recharge.

4 Reduce notifications

Delete apps and remove notifications from your phone by placing it on Do Not Disturb mode. Only allow pings from close friends and colleagues.

5 Eliminate meetings

Reduce your meeting times by half. Elongate recurring meeting cadences by 2x. Get rid of meetings with no agendas. Politely decline meetings with too many stakeholders.

6 Conduct honest check ins

Check in with yourself and your Office of the CEO team by asking: Are you Red, Amber or Green with regards to burnout? Make a burnout mitigation plan.

7 Rotate roles

Set term limits for your role as CEO, Chief of Staff and Executive Assistant. Identify star performers and complete succession plans.

CEDAR INSIGHTS

Chiefs of Staff are workaholics. The job goes above and beyond the traditional 9-5.

18%

work every weekend.

46%

work some weekends.

35%

rarely work during the weekend.

(LinkedIn Poll, n=170, Cedar Research, March 2024)

Mackenzie Lee
CEO & Founder, Cedar
Office of the CEO Consultancy

4.9 10 step checklist to build your Chief of Staff profile

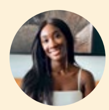
The Chief of Staff comes in many shapes and sizes. Here's a simple 10-step checklist for CEOs and top executives to complete when they are looking to create the profile of their future Chief of Staff.

- Pinpoint CEO Zone of Genius
- Identify CEO leverage points
- Identify executive team leverage points
- Review company roadmap and mandate
- Create company talent map
- Assess CEO working style
- Evaluate executive team dynamic
- Understand company vision and mission
- Analyze existential company issues
- Identify high-priority company leverage points

The CEO, executive team and company leverage points all inform the perfect Chief of Staff profile.

EXPERT TIP

"The Chief of Staff is an extension of the CEO, and their success relies heavily on the trust and working relationship they build together. While CEOs often seek to hire a Chief of Staff with a complementary skill set and perspective, it's crucial that this is approached tactfully. A Chief of Staff who shares a similar approach and work style can operate more efficiently, whereas significant differences in style may require a pre-set framework to avoid prolonged learning curves and friction."



Erica Akitani-bob
Chief of Staff, All Places
Private Company, Legal

4.10 Background of a successful Chief of Staff

At Cedar, we look for the following types of work experience when finding our next generation of Chief of Staff talent:

1. Management Consulting
2. Operations
3. Technology
4. Healthy dose of Emotional Quotient (EQ)

1 Management Consulting

Management consulting experience gives a future Chief of Staff a strong set of business fundamentals, strategy frameworks and problem solving skills. Management consultants understand how to break down complex problems in an analytical fashion and are effective at presenting their findings to C-suite and top executives.

2 Operations

Operations folks understand how to create a project plan, how to wrangle resources, and how to efficiently achieve outcomes. They can move a really large, complex program or project to completion while staying on time and under budget. Operations professionals are highly cross-functional and pragmatically deal with risks and blockers. These individuals create a strong rhythm of business and can rally their team around a common goal.

4 EQ

As a bonus component to the ideal Chief of Staff profile, we like to see someone with really strong EQ. This allows the future Chief of Staff to make quick relationships, handle detractors, and connect with all types of stakeholders.

4.11 10 steps to hire the right Chief of Staff

1. Assign a hiring manager or use an executive search firm

2. Identify your leverage points and working style

3. Build a perfect Chief of Staff profile based on the CEO, executive team and company needs

4. Commit to attractive, market rate Chief of Staff compensation

5. Define Chief of Staff employee value prop

6. Leverage multiple talent sourcing channels

7. Interview a select number of candidates

8. Give finalists a time-bound project-based take home test

9. Create an attractive offer package for your #1 candidate

10. Close your new Chief of Staff!

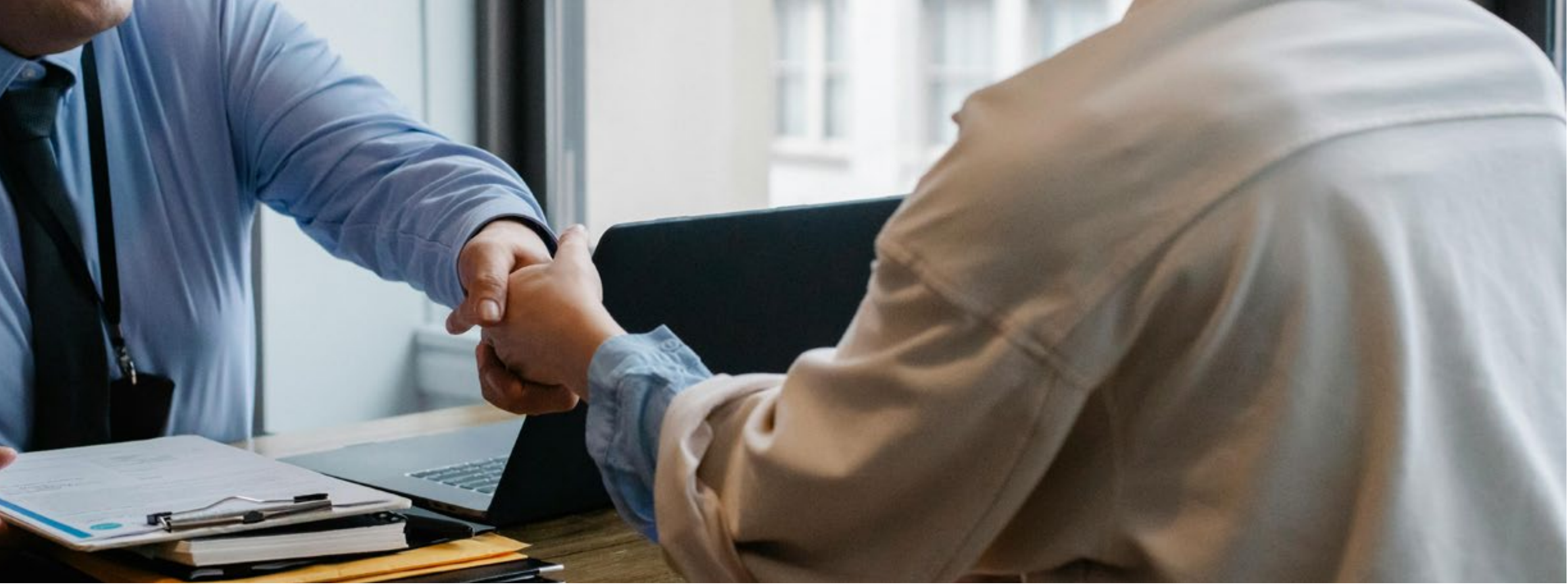
3 Technology

Most tech companies are at the forefront of modern ways of working. This type of work experience gives a future Chief of Staff broad exposure to tools and practices that drive productivity. Tools can include Slack, Clickup and Loom. Best practices can include agile development, asynchronous collaboration, and A/B testing.

EXPERT TIP

"As a Chief of Staff, embracing your authentic self and showing vulnerability can be your greatest strength. By tapping into emotional intelligence, you foster deeper connections with your team, build trust, and create an environment where others feel safe to do the same. These relationships, combined with self-awareness of your strengths and areas for growth, enhance your leadership and communication. By leveraging both your strategic abilities and emotional depth, you can drive success for the CEO, the team, and the organization."

Meg Steinschauer
Chief of Staff, Ivy Farm Tech,
Startup, Biotech



4.12 6 Chief of Staff hiring mistakes

Avoid these mistakes when you're hiring a Chief of Staff:

- Create a generic job description
- Assign the CEO to lead the day-to-day hiring process
- Don't equip the Chief of Staff with an Executive Assistant
- Interview a ton of candidates
- Set compensation low to see what talent might bite
- Post only on your LinkedIn company page

4.13 The case for a Deputy Chief of Staff

Does your Chief of Staff seem on the verge of burnout? Are they at a risk of quitting?

Maybe it's time to consider a Deputy Chief of Staff who can maximize the Chief of Staff's impact and accelerate growth even faster at your company.

The Deputy Chief of Staff can be a thought partner to the Chief of Staff and make the job less lonely and isolated. This individual can complement the skillset of the current Chief of Staff and execute against any overflow work.

Finally, there's a backup system. In the case that the Chief of Staff needs to go on vacation, gets sick, or leaves the company, there's someone available to pick up the reins and continue BAU.

EXPERT TIP

"Dear Chiefs of Staff: Train your Deputy Chief of Staff as if they will become your successor."

Charlotte Chance
Chief of Staff, Yass Partners,
Private Company, Professional Services

*Connect with Mackenzie Lee, Cedar CEO, on LinkedIn **here** to learn more about hiring a Deputy Chief of Staff.*

CHAPTER 5

Enablement

5.1 4 Steps to successfully managing workflow in the Office of the CEO

Every day in the Office of the CEO you must:

- Track and delegate 100s of tasks
- Manage dozens of workstreams to completion, and
- Report on the outcomes of all work to all stakeholders.

It's imperative that you implement a work management system that works for your team. But how?

You likely already have some sort of workflow management tool in place today, so you must decide whether it fits your needs and double down or decide to deprecate it altogether. Common tools include Teams, Asana, ClickUp, Monday, and Trello.

But move on quickly, because it's really the workflow management process that unlocks true value. It's the repeated repetitions of **Delegate > Track > Report (DTR)** that enables your team to embrace this as a net benefit rather than a chore.

Here are 4 steps to managing Office of the CEO workflow:

1 Assign an owner

Assign an Office of the CEO team member whose goal is to develop workflow management in your executive office.

2 Test the tool and process

Identify a few workstreams with just a few stakeholders to test the new process in a controlled environment on a specific project. Use a task tracker to create a visual representation of progress and ultimately drive clarity around task status, owner, and end date.

3 Champion your new best practice

Have the project group champion the tool and the process along the way by reporting out their workflow management successes to the team.

4 Repeat

Move on to other workstreams and other projects to expand usage of the tool and adoption of the **DTR** process.

Finally, it's your CEO's responsibility to enable your executive office. Often the Office of the CEO becomes blocked and bottlenecked because other executives and leaders don't respect the authority of the CEO Office, which adds a ton of friction to any operation.

EXPERT TIP

"To effectively run the Office of the CEO, it's essential to understand the three key pillars: people, process, and technology, which together maximize impact and ensure efficient operations. A Chief of Staff can align these pillars with the CEO's strategic vision while providing valuable insights and serving as an advocate."

Melani Delo-Cano
Global Operations Lead & Chief of Staff, Google, Public Company, Tech

5.2 3 steps to building amazing Office of the CEO playbooks

Playbooks are your secret weapon to move your Office of the CEO at warp speed. They'll save you time, reduce mistakes and help you onboard new team members faster. Playbooks can define complex processes, interaction models and handoffs between your CEO, Chief of Staff, Executive Assistant and the rest of the business. Characteristics of a good playbook include clarity, completeness, and straightforward language.

How do you build great playbooks? Let's walk through the following 3 step **Observe > Document > Develop** (ODD) process with an example: a playbook for delivering CEO Public Speeches.

1 Observe

Examine what's working well and identify what's not. Take a look at a few public speeches that went well for your CEO. Understand the necessary steps to prepare for, deliver and follow up on public speeches. Review speeches that were total flops and figure out the reasons why.

② Document

Now it's time to create your playbook. Write down each step and hand off to the relevant stakeholder. For example, the Executive Assistant might schedule the speech. The Chief of Staff ghostwrites the speech. The CEO makes final edits. The Chief of Staff runs a rehearsal with the CEO. The CEO delivers the speech. The Chief of Staff follows up with any key audience members. The Director of Marketing posts about the speech on social media.

③ Develop

Don't forget to enhance your playbook with principles, tips, images and annotations to bring your playbook to life. You can add photos of your CEO on stage, past speech transcripts, and successful social media posts. Once you have your Public Speech Playbook in hand, it's time to share it with the rest of your Office of the CEO team and relevant business stakeholders to see what they think. Get their feedback and incorporate any changes. It's a good idea to refresh your playbooks and retrain the team every 6 months or so, as best practices change.

That's it: 3 steps to build amazing playbooks: **Observe > Document > Develop**. Remember, the best Offices of the CEO maintain dynamic playbooks to get work done at blazing speeds.

EXPERT TIP

"Create a Standard Operating Procedure handbook (SOP) for tasks that can and should be delegated. Keep it updated and tend to it regularly."

Charlotte Chance
Chief of Staff, Yass Partners,
Private Company, Professional Services

5.3 Mastering the art of building company KPI dashboards

How accurate and how actionable is your company KPI dashboard? CEOs rely on up-to-date information on key performance indicators to make vital decisions about the company.

If your dashboard isn't accurate, then you may be focusing on the wrong problems. For example, if employee sentiment is showing red, but your team is actually quite loyal, you might squander valuable resources on an employee engagement program.

And if your dashboard isn't actionable, then you waste time creating it in the first place. Given the example above, you choose to do nothing and your employee engagement level stays the same or even gets worse. How do you fix this?

Improve dashboard accuracy by inspecting data quality, data sources and data consistency. Spot problems and sanity check your data on a regular basis. Remember, garbage in, garbage out.

Make your dashboard actionable by adding your own data analysis and suggested action plans to boost your KPIs. Dashboard information should also be easy to consume with attractive, color-coded charts and proper appendices.

Finally, dashboard review sessions should be focused on the "so what" so that you decisively commit to future actions to strengthen your KPIs.

5.4 6 steps to create trust with your CEO in a remote setting

As an Office of the CEO team that works remotely, the main way you create connection with your CEO is through your phone and laptop. How do you do this effectively? Follow the 6 steps below to create trust with your principal in a virtual setting.

1 Set up regular communication channels

Schedule regular check-ins to discuss work product, feedback, and any concerns. Choose communication channels and a commonsense cadence that work best for both of you. This may include email, text, Zoom, Slack, Loom, and voice memos.

2 Be proactive

Take the initiative to communicate with your boss, even if they don't reach out to you first. Batch your communications so you aren't pinging them too often.

3 Get to know your boss

Insist on in-person interactions during onboarding to build trust faster. Suggest regular quarterly in-person offsites. Ask your CEO questions about their life outside of work. Read up on their biography. Understand what personal values they hold. Have them create a personal user manual - a **Guide to Working with Me** - to understand their working style.

4 Focus on results

Make sure you're communicating your progress and results efficiently and effectively. Provide regular updates on your work and highlight your achievements. Bullet formats work best for fast communication.

5 Show empathy

Acknowledge that your boss may also be struggling with working in a remote setting. Offer support and ask if there is anything you can do to help them manage distributed teams.

6 Serve as a trusted confidante

Allow your boss to come to you with sticky situations and issues that they otherwise wouldn't be comfortable sharing with the rest of their executive team. Take an active listening role and offer solutions only if asked.

EXPERT TIP

"Set regular check-ins with your CEO—whether through weekly meetings to align on action items or 1:1 sessions to discuss how the role is working for both parties. This practice helps maintain a mutually beneficial working relationship."

Miranda Russell
Chief of Staff, Helcim, Startup, Fintech

5.5 10 steps to safely add AI to your Office of the CEO

AI has immense power to either derail your company performance or to dramatically accelerate your growth. How do you harness its potential without going off the rails? Here's a how-to guide to confidently and securely add AI to your CEO Office:

1 Define goals

Examine the driving force behind your interest in AI. Is it speed, efficiency, or quality of output?

2 Set up safeguards

The Office of the CEO handles the most sensitive information in your organization. You must design security safeguards to make sure that confidential information isn't leaked or shared with an AI tool.

3 Review privacy and risk

Private and personal information must be handled appropriately as well. Document the potential risks should your AI tool gain unauthorized data access, which exposes you to hackers, reputational risk, and trade secret risk.

4 Define pilot

Design an AI pilot program that allows you to explore your goals in a controlled data sandbox for a specific use case. Draft a program charter that emphasizes risk mitigation and get CEO, CCO, and GC buy-in.

5 Select tool

Select a tool that's best in class and has a reputation for security, privacy, and risk controls. Avoid selecting experimental technology for your AI pilot. If something goes wrong, your program will get killed.

6 Test workflow

Find a workflow that avoids sensitive information, identify AI leverage points, and test out the tool. For example, market intelligence might be an attractive test case since you do not need to input company secrets.

7 Report metrics

Based on the goals you set upfront, track metrics—did you complete the task faster? Did you produce more output? Did the quality of your deliverable increase? Share these metrics along with your Office of the CEO team.

8 Write playbook

Once you have a workflow that works, it's time to update your existing playbooks with the new AI embedded in the process. Err on the side of over-explanation to ensure that the tool is used safely.

9 Draft policy

To professionalize AI even further in your Office of the CEO, draft an AI policy. This will give your C-suite more confidence on how best to use the tool in a safe and secure manner.

10 Define roadmap

Congrats, now you have built out a small AI practice within the Office of the CEO. Assign an AI owner and draft a roadmap of other workflows that could benefit from AI. Share the roadmap with your team and continue on your AI journey.

EXPERT TIP

"Every leader knows AI will be transformative for their business, but it can be challenging to identify signal through all of the noise. The Chief of Staff can be a critical thought partner in identifying where and how to effectively deploy AI in the Office of the CEO and across an organization."

Sawyer Middeleer
Chief of Staff, Aomni, Startup, Tech

Contact us to learn how to safely and effectively integrate AI into your CEO Office while protecting your company's most sensitive information.

CONTACT US

CHAPTER 6

Execution

6.1 8 reasons why you should build protocol into your CEO office

Clear protocol is everything in the Office of the CEO. Here are 8 reasons why you should build protocol into your CEO Office:

1 Efficiency and output

Protocol means you can get your job done, faster. You can do things like churn out board decks in far less time.

2 Risk reduction

Protocol ensures that the right controls are in place. The risk of something bad happening, like a CEO going off script at your all-hands, is far less.

3 Less mistakes

You're bound to make fewer mistakes with clear protocol. For example, there is explicit direction on how to represent your CEO in a blog post or social media post.

4 Crisis management

In times of crisis, protocol offers clear guidelines for action and communication. You can manage unforeseen issues like an employee lawsuit more effectively and calmly.

5 Security

Protocols can physically protect your CEO as well as digitally protect sensitive information, like investor earnings reports.

6 Strong team dynamics

If you have strong protocol in place, your Office of the CEO colleagues can confidently trust previously-defined processes and execute faster.

7 Representation

Communications protocol means your Office of the CEO can deliver a singular message on behalf of your CEO, ensuring that your message is coherent and unified.

8 Professionalism

Protocol ensures that all interactions with your CEO are professionally managed and conducted at a high level that reflects the prestige and power of your top executive.

Connect with Mackenzie Lee, Cedar CEO, here to start building strong Office of the CEO protocol.

6.2 10 steps to amazingly efficient CEO meetings

A bad meeting with your CEO costs upwards of $7,000 (Source: Equilar and Cedar analysis). Not to mention the intangibles which include low energy, wasted time and lack of action.

How do you avoid this? Implement Meeting Protocol in your Office of the CEO. Here are 10 steps to focused, optimized meetings with the CEO:

1 Say no

The first step is to say no to meetings that are low priority because they cover issues that should not be escalated to the CEO's attention.

2 Solve over email or async video

Next, try to solve the matter over email if possible. Async video with a tool like Loom can also help. Remember, the more you get done asynchronously, the faster you can move on to bigger and better projects.

3 Delegate responsibility

If you can't solve over email, then try to delegate decision responsibility to someone outside of your Office of the CEO. This lessens your workload and empowers your leadership team.

4 Reduce stakeholders

If a meeting is absolutely necessary, review the request and reduce the proposed number of stakeholders in the meeting. In other words, avoid large group meetings.

5 Reduce time length

Take a look at the meeting request and reduce the proposed time length by half. See if you can shorten the meeting to save everyone time.

6 Require pre reads

If a CEO meeting is necessary, then require homework to be completed by the meeting requestor. Get them to provide a complete decision package of materials.

7 Identify open questions and decision points

The pre-read should have identified open questions and decision points, which should be added to the calendar invite itself as agenda items so that the meeting stays on track.

8 Track notes and action items

During the meeting itself, take notes on discussion points. Help your CEO delegate effectively by identifying clear action items with owners, dates, priority levels and estimated level of effort.

9 Follow up

Follow up on all action items to ensure the meeting delivers its full value. Leverage your Workflow Management tool to help you track the 100s of items that come out of your CEO meetings.

10 Review calendar on weekly basis

Complete a calendar analysis each week. Run through steps 1-3 above to ruthlessly eliminate non-important CEO meetings and steps 4-5 to scope down meeting requests.

6.3 7 steps to speed up Office of the CEO decision making

Your Office of the CEO makes 297,000 judgment calls every day.

Here's the calculation:

33,000 **decisions** per person, per day x **3 people** (CEO, Chief of Staff and Executive Assistant) x **3x CEO Office team member workload** per average human workload = **297,000 decisions** per day

Sources: Harvard Business Review and Cedar research.

Office of the CEO decisions you might encounter include the following: Do you invest in a new product? Do you coach a failing leader? Do you meet with an unqualified prospect?

These decisions add up and cause real decision fatigue if you're not careful. So, how do you increase decision velocity without sacrificing quality? How do you avoid death by 297,000 decisions?

The answer is Decision Protocol, a rules-based process that helps decision groups and your Office of the CEO manage and document your reasoning. Here are 7 steps you can do to speed up decision making and reduce decision exhaustion:

1 Scope the decision

Figure out what you are actually deciding on, i.e. are you deciding to go to market in 5 new cities or 3 new countries? Define your decision criteria, which can include cost, time, or value.

2 Say yes or say no

Based on decision scope, determine whether this is a decision for your Office of the CEO or if it can be delegated to someone on your C-suite team. **The more you empower your leaders to make their own decisions, the more ownership they feel over their job and the less work you have to do in the CEO Office.**

3 Assign the decision owner

If you must take on the decision, nominate someone on your Office of the CEO team to take on this decision - either the Executive Assistant, Chief of Staff or your CEO as a last resort.

4 Analyze possibilities

Identify the top 3 decision options to simplify the decision process. Gather information on each choice and analyze all outcomes based on your predetermined criteria.

5 Make the decision

Make a call and commit to your decision. Document your decision choice, reasoning and date in a referenceable Decision Log.

6 Take action

Implement your decision and take immediate action. Track the business outcomes of your decision over time.

7 Review results

Review your Decision Log every quarter to complete a post-mortem on the quality of your decisions, the speed of decision making and your Decision Protocol itself. Make adjustments as needed.

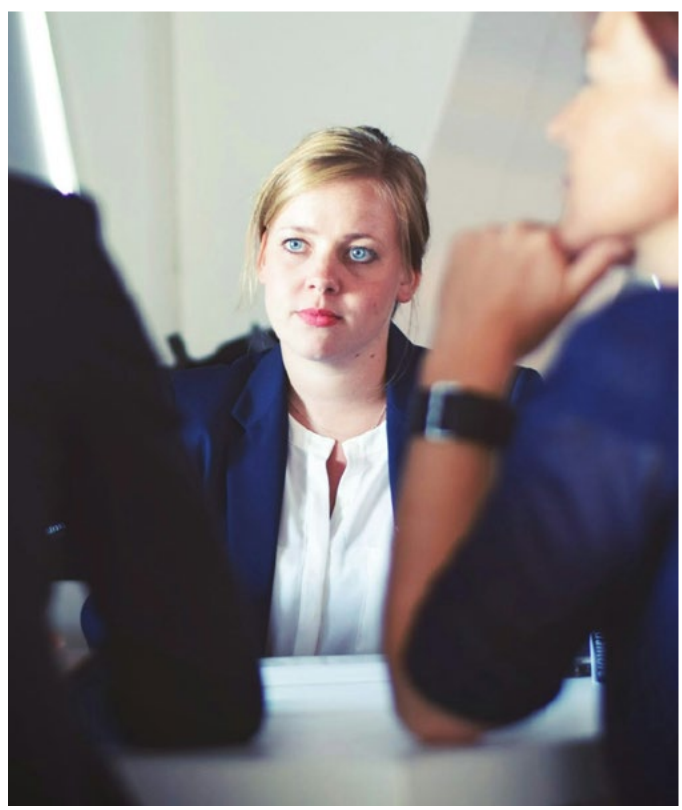
6.4 7 Steps to implement a strong Office of the CEO investment protocol

History is littered with stories of failed CEOs making bad investments: Adam Neumann from WeWork, Kenneth Lay from Enron, and Stephen Case from AOL. That's why high stakes investment decisions benefit from rigorous investment protocol, facilitated by the Office of the CEO.

Here are 7 Investment Protocol steps to follow in your executive office:

1 Define objectives and criteria

Ask yourself: Why are you making an investment? Possible reasons might include new growth targets, product diversification goals, or a desire



to become #1 in your market category. Next question: What criteria will you use to evaluate investments? ROI, risk, strategy alignment and time horizon are common considerations.

2 Gather information

Complete full due diligence on the investment opportunity and consult financial analysts, industry experts and legal advisors to help round out your understanding of the investment opportunity. You want to derisk the investment as much as you can by procuring sound intelligence.

3 Complete due diligence

Analyze the investment according to your goals and criteria. Produce a financial analysis, risk assessment, strategic analysis, feasibility study, and legal review to look at all angles of the investment.

4 Develop investment proposals

Create multiple investment proposals with different scenarios (base case, aggressive case and conservative case) along with an investment summary, benefits, financial projections, implementation plan and risks.

5 Review and approve

Set up multiple rounds of review and formal approval, which can often include your board. Obtain formal sign off and buy-in from all relevant parties.

6 Execute and monitor

Implement the investment and assign a project owner to this key workstream to ensure that the project is delivered on time and within budget, while achieving all of the milestones that you've previously outlined.

7 Evaluate and report

Report the status and performance of your investment to your business, board and shareholders. Deliver regular communication to control the success narrative of the investment, especially if you hit roadblocks along the way.

6.5 5 ingredients for successful business reviews

Effective C-suite business reviews in the Office of the CEO are crucial. Get it right and your C-suite comes out energized with clear direction and defined action plans. Get it wrong and everyone comes out demoralized and confused about what comes next.

The cost of CEO time is estimated at up to $4,800 per hour for top companies. Trust me, you don't want to waste their time. Here are 5 ingredients for successful business reviews:

Engaging pre-reads

Before the business review takes place, ensure that your business leader prepares pre-reads to help all meeting participants get up to speed. This can include an executive summary, wins and celebrations, roadmaps, standardized charts, risks and blockers, and open questions.

Accurate and actionable charts

Charts that show the health of the business unit need to be accurate and actionable. Ideally there is double and even triple checking of the numbers before the dashboard is shown in the business review. Written commentary should accompany, along with proposed action plans.

Defined open questions and decision points

Open questions and decision points should be articulated before the business review starts, so that the meeting is highly productive. Record answers and decisions, while playing timekeeper to keep the group on track.

Clear action plans

If you hold a business review but there is no commitment to action, then you've just wasted a bunch of time. Make sure you collect actions and owners with no ambiguity about who is doing what by when.

Successful follow up

Follow up is key to make sure actions are executed properly. Enter all actions into your master project tracker or workflow management system and check in on the status of these actions well before your next business review.

*Subscribe to our newsletter **here** for more expert tips on running effective C-suite business reviews and ensuring every executive meeting is productive and impactful.*

6.6 5 steps to nailing special projects in the Office of the CEO

Your CEO has a million demands on their time. They don't have the capacity to execute special projects to explore a new market, revitalize the company brand or execute AI transformation. They would love to have someone explore a strategic partnership, drive cultural change or launch new sustainability initiatives.

If a special project doesn't have a natural home with someone on your C-suite team, the CEO might delegate special projects to the Office of the CEO instead.

Here are 5 tips to executing special projects on behalf of your CEO:

1 Commit 100% or just say no

First off, you must fully agree that this is a project worth pursuing, given the other competing priorities on your plate. Your CEO might be leading you down a rabbit hole and you need to learn how to push back and politely say no to distractions. Assign the project to someone else if need be.

2 Set up a Project Charter

Next, draft a Project Charter to gain clarity on project goals, success criteria, scope, deliverables, team, milestones, project plan, and risks. Run this through an approval process so that all stakeholders commit to the project, including your CEO.

3 Assemble your team

Now that you have CEO sponsorship, marshal your resources across your company to help you execute the project. Conduct a formal kickoff where you cover the project charter, with special attention to everyone's roles and responsibilities.

4 Execute your project

Enough said, since as a Chief of Staff, you are a master at getting things done. If you run into problems, get your CEO to unblock you. Report your progress along the way.

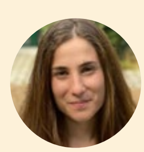
5 Conclude your project

Congrats! You've reached the end of your project. Complete a postmortem and deliver a presentation to your CEO on your project successes, challenges and outcomes, plus a section on what to do next. Remember to get your flowers - you deserve it. Hand off the project to the business while providing actionable jumping off points to continue the work in your absence.

Follow these 5 steps to execute special projects with flying colors, gaining even more trust from your CEO to deliver outsized impact to your company.

EXPERT TIP

"Approach cross-functional projects with a beginner's mindset, recognizing that your role is not to be the expert but rather 'the glue' that maximizes each team's impact and breaks down silos. Instead of asking 'why?'—which can be perceived as accusatory—ask 'how?' to foster reflection, drive progress, and cultivate a solution-oriented mindset."



Julia Sarfati
Chief of Staff, Shipup,
Startup, Tech

6.7 Achieve better board management with a world-class Office of the CEO

Aim to deliver an exceptional board experience for your internal team and the board itself. The payoff is huge: you avoid uncomfortable oversight and you enjoy more strategic, insightful discussions on where to lead your company.

Otherwise, the downside is tragic. Your CEO might lose their job and the entire Office of the CEO team suffers a hit to their own personal reputations.

The question becomes: what board services can you provide for your CEO as a team member in the Office of the CEO?

Board meeting preparation

The Chief of Staff or a very senior Executive Assistant coordinates the creation of board meeting materials, well in advance of the actual board meeting. This can include interfacing with your finance, strategy, operations and business leaders to source the data and content that will go into the board deck.

Ask for what you need, weeks in advance. Clean the data, update charts, perform analysis, propose a narrative arc and prepare a first draft for your CEO's review. Facilitate several rounds of edits and reviews with the stakeholders mentioned above.

Buckle up. You might reach version 10 of the deck, depending on how many drafts you go through. This ensures that your company narrative is strong, strategic and compelling. The best board decks anticipate and handle all potential objections and questions from the board. Recall past questions and comments from board members, and be sure to preemptively address them.

Do you need to address new AI technology, a faulty product recall, or company culture? Ask yourself - are there any holes in our story, or is it water tight? **Board prep can be stressful and time intensive on top of the daily responsibilities, so make sure you carve out extensive timeblocks to get it done.** Avoid treating this like a last-minute school project that's due the next day.

Board meeting participation

The CEO is the main company representative who attends the board meeting. The Chief of Staff or Executive Assistant can also be invited into the board meeting itself as well as select committee meetings on a case by case basis. Approval sessions are rarely attended by the Chief of Staff and Executive Assistant. Board meeting minutes are the responsibility of the company secretary.

As the meeting progresses, stay alert, notice who is saying what, and take a temperature check of the room. Ask yourself: Is the conversation frosty or is it warming up quite nicely? Has one of the board members changed their tone or demeanor from your last board meeting? What's the overall tenor of the discussion: Contentious or collaborative?

Board meeting follow up

Immediately post-board meeting, schedule a brief meeting with the Chairman of the Board and the CEO. Review each agenda item and discuss whether it was appropriately discussed and handled in the board meeting itself.

Hold an internal debrief meeting with the Office of the CEO. Review what worked and what didn't. Review the meeting minutes and determine how you might adjust your company's strategy in light of what was discussed.

Do you need to put more attention on sales, team or AI? Do you need to create better relationships with specific board members who seemed uninspired or even antagonistic in the board meeting itself? Make a plan to improve your next board meeting, and keep on improving your CEO-board relationship.

*Connect with Mackenzie Lee, Cedar CEO, on LinkedIn **here** to learn even more board tips and tricks.*

6.8 7 steps to plan highly engaging leadership retreats

Here are 7 steps to plan, design and execute highly engaging leadership retreats for your C-suite:

1 Set clear goals

Set clear retreat goals and expectations to make sure you are getting maximum value out of high stakes retreats. For example, are you looking for better team collaboration or improved strategy?

2 Identify stakeholders

Reduce the amount of stakeholders to keep the retreat at an intimate level. Consider inviting star performers or external advisors for guest appearances on focused topics like increasing emotional intelligence or incorporating AI into the workplace.

3 Complete logistics

Assess your C-suite team's preferences on retreat location and lodging. Make sure to book the venue and secure travel plans months in advance. Trust us, you do not want to scramble the week before.

4 Create a master schedule

Source programming ideas from your C-suite team. Create a master schedule with agendas and session goals. Break up intense working sessions with team bonding sessions, meals and special activities.

5 Facilitate sessions

Appoint a trusted facilitator or hire one to help you run these high stakes retreats. Remember, selecting the right vendors for leadership retreats is extremely important to ensure the quality and overall success of these high stakes events.

6 Complete follow up

After the retreat has concluded, send a copy of all notes and actions to the group, as well as a short feedback survey. Your Chief of Staff or the Executive Assistant can follow up with individual C-suite leaders on their individual actions.

7 Report outcomes

Did you hit your retreat goals? Share the results of your retreats with your C-suite team and selectively share headlines with your entire company. Make adjustments as necessary for future retreats.

Contact us if you need help planning and executing high-impact C-suite retreats that maximize value and dramatically increase leadership effectiveness.

CONTACT US

6.9 8 steps to better CEO time management

Here are 8 steps to help your CEO rebalance their time towards high priority activities that they actually enjoy doing.

1. Set up a quarterly meeting for CEO Time Rebalancing
2. Create two tables, 1 for professional time and 1 for personal time
3. Identify typical activities in your CEO's work life, i.e. meetings, strategy, investors
4. Set up a quarterly meeting for CEO Time Rebalancing
5. For each activity, quantify the current CEO time spent in hours per week
6. For each activity, identify the desired CEO time spent in hours per week
7. Make an action plan to reduce time spent in an undesired activity, i.e. meetings
8. Make an action plan to increase time spent in a desired activity, i.e. strategy

Hint: Reference your CEO's Zone of Genius to figure out where to maximize their time and look to your Zone of Incompetence to decide where to minimize their time.

Follow these 8 steps on a quarterly basis to rebalance your CEO's time.

6.10 6 tips to coach your CEO on better delegation

Dear Office of the CEO: if you have a CEO that can't delegate, say hello to 12 hour days while you deal with a new crisis every week. The more you can help your CEO delegate, the more you can reduce your Office of the CEO workload, strengthen your C-suite team capabilities, and speed up execution.

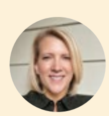
Here are 6 tips to coach your CEO on better delegation:

Identify what work to delegate

Define your CEO's Zone of Genius and Zone of Incompetence (low skill, low will, low value). Let your CEO retain work in the former and delegate work in the latter.

EXPERT TIP

"A Chief of Staff plays a crucial role in aligning the CEO's time with the company's strategic priorities through a prioritization framework that evaluates tasks by impact, urgency, and alignment with key goals. By setting clear criteria, maintaining a rolling agenda, and conducting regular check-ins, the Chief of Staff ensures that the CEO's time is effectively managed to drive the organization forward."



April Lough
Chief of Staff, i4cp,
Private Company, Professional Services

Play to your team's strengths

Take stock of every C-suite team member's strengths and identify star performers on their teams. Delegate work that fits into their respective Zones of Genius.

Get clear on desired outcome

Help your CEO paint the picture of what amazing looks like. For example: "Hey CFO, please work with the CMO and the Director of Sales to create a compelling 10 page business case deck with quantitative and qualitative reasoning to invest in a new CRM technology. Deliver this to me in 2 weeks at a High priority level while spending about 20 hours on this project."

Let failure happen

If this is the first time that you CEO is delegating a specific task or project, tell them to expect failure to happen at the onset. Remind them to be patient and let the situation play out to avoid CEO micromanagement.

Set up 2-way feedback

Set up an open CEO communication channel to proactively address any blockers or issues that crop up. Help your CEO talk honestly about what's going wrong and help them deliver any needed course corrections.

Celebrate the wins

Nothing feels better than CEO praise, so make sure to remind your CEO to publicly and privately celebrate the successes of your team on a regular basis.

Follow Mackenzie Lee, Cedar CEO, on LinkedIn here to discover more strategies for coaching your CEO on effective delegation and improving your Office of the CEO's efficiency.

EXPERT TIP

"My advice to CEOs: view your Office of the CEO team members as your force multipliers. Don't hesitate to trust them and delegate as much as you can."

Shiraz Mahfoudhi
Senior Director of Strategy & Chief of Staff to the CSO, Contentsquare, Startup, Tech

6.11 5 steps to building a CEO sales operations function

If you build a repeatable system to drive CEO sales, you massively derisk your company's revenue plan. CEO sales practices include originating new deals by leveraging the CEO's personal network. Other activities also include leveraging the CEO as a closer for strategic deals. So, how do you get started?

Here are 5 steps to build the CEO sales function:

1 Clear the CEO calendar

Remove meetings from the CEO calendar and dedicate at least 2 hours of timeblocks each week to execute CEO sales-related activities.

2 Scan your CEO's network of contacts

Apply your ideal customer profile as a filter to your CEO's network. Leverage LinkedIn Sales Navigator to identify target prospects that are 1st degree or 2nd degree connections.

3 Execute outreach campaigns

Send personalized messages to 1st degree connections. Ask for warm introductions to 2nd degree connections. Deliver multi-message email and LinkedIn outreach campaigns to start conversations that dramatically increase deal origination.

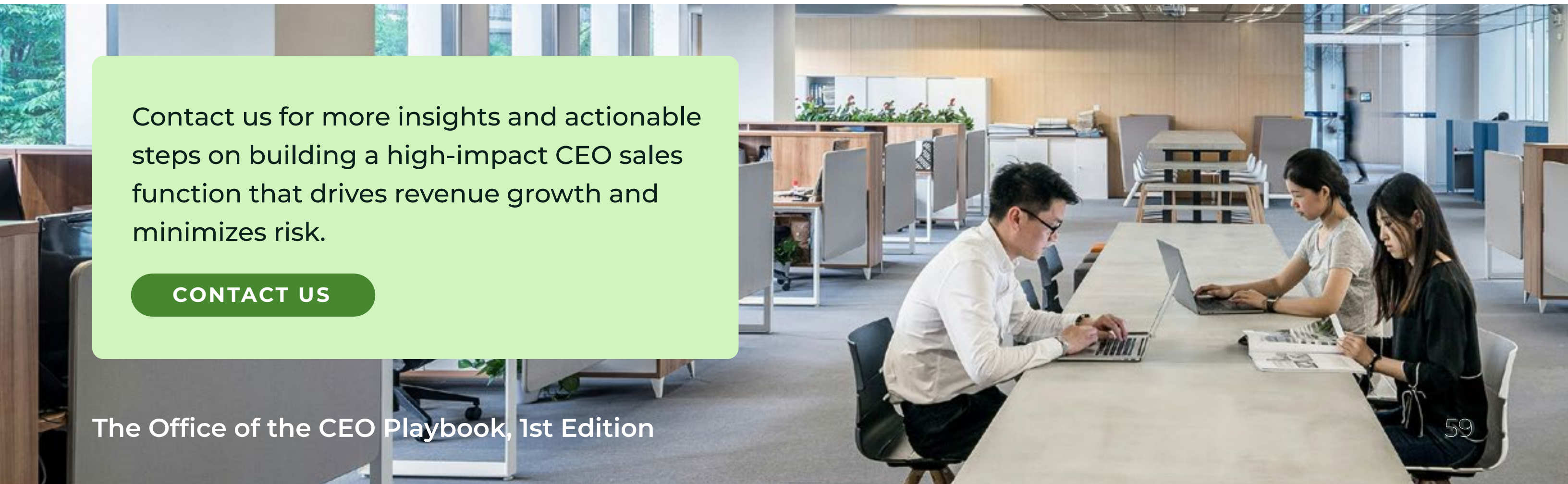
4 Bring in the CEO to close big deals

For non-CEO originated deals, put the CEO on the field to close the deal near the finish line. Increase your win rate and drive topline growth for your biggest, most strategic deals.

5 Track CEO sales in a CRM

Track the success of outreach campaigns, deal origination, and win/loss rates for CEO sales activity. Identify pain points and development areas to increase origination and close rate even more.

Follow these 5 steps to build the foundation of your CEO sales operations function. The more time you invest in CEO sales, the more revenue you'll get out. It'll pay itself out, many times over.



Contact us for more insights and actionable steps on building a high-impact CEO sales function that drives revenue growth and minimizes risk.

CONTACT US

CONCLUSION

Thank you for reading!

If you've made it this far, we salute you. In the spirit of continuous improvement, please send any comments or questions our way.

What's next in your journey? Get in touch **here** if you'd like to explore Office of the CEO coaching, training or consulting services for your organization. Finally, stay tuned for industry-defining Office of the CEO research and benchmarking reports in 2025.

Talk soon,
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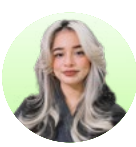

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About the author

Mackenzie Lee is the CEO of Cedar. He helps CEOs and their C-suite teams to let go and do more. He gives leaders the freedom to do things that matter.

Mackenzie fights C-suite distractions, busywork and blockers. He helps his clients to hire a Chief of Staff, build the Office of the CEO, and implement operating systems that turn executives into fast and fearless leaders.

Mackenzie has over a decade of experience partnering with the Office of the CEO as a former management consultant, startup founder and Chief of Staff. He has worked with dozens of C-level leaders from Fortune 3000 companies, top scaleups, private equity-backed companies, and government organizations.

Mackenzie maintains a particular sector focus on professional services, financial services, technology, and sciences. He's advised executives at Optum, Google, Palantir, Citi, and the Princeton Plasma Physics Lab among other top organizations.

Mackenzie is a sought-after speaker, researcher, and thought leader on all things related to leadership, Chief of Staff and the Office of the CEO. His insights have impacted over 15,000 leaders from more than 1,000 organizations around the world.

He is a graduate of the Stanford StartX accelerator, proud Stanford engineering alum and now lives in New York City.

Connect with Mackenzie Lee

Connect on LinkedIn

Cedar events

Cedar is committed to delivering exceptional leadership events that unite Offices of the CEO around the world. We create unique forums for CEOs, Chiefs of Staff and Executive Assistants to **come together in person and virtually** on LinkedIn Live and Zoom.

These include AMAs, live webinars, fireside chats, podcasts and happy hours. We also offer targeted programming for founders, board members, investors, executive coaches and C-suite executives who partner with the Office of the CEO.

Join our powerful peer community to gain actionable insights on tackling the most challenging and pressing issues of today's modern business world: AI, sustainable growth, remote work, restless teams and avoiding burnout.