Is the CoS role right for you?

Part 1: Know Yourself

Self-Assessment

Fill out the questions below to help you establish a baseline understanding of your interests, skills, values, and personality traits. Be sure to complete this section before moving to the next page! 😊

1. <u>*Interests:*</u> What are my interests? What engages me? What energizes me? What am I passionate about? (Bonus: *What drains my energy?*)

   _____
   _____
   _____

2. <u>*Skills:*</u> What do I do well? What skills do I need to develop?

   _____
   _____
   _____

3. <u>*Career Values*</u>: What does "meaningful work" mean to me?

   _____
   _____
   _____

4. <u>*Personality Traits*</u>: What are my strongest personality traits? How would my friends describe my work ethic and personality?

   _____
   _____
   _____

Chief of Staff Role Assessment

*Below is my personal assessment of the general interests, skills, values, and personality traits of a strong candidate for the Chief of Staff role. This is meant to be a loose guideline, **not** a rule. As you know by now, the role varies widely company to company, but the lists below attempt to capture the major (and common) themes.*

1. <u>Interests</u>
   - I enjoy working on hard problems.
   - I like the variety and novelty of working on a lot of different things at once, or in different functional areas of the company.
   - I'm energized by both high-level strategizing and executing in the weeds.
   - I enjoy taking full ownership of projects.
   - I'm energized by stretch projects or goals.
   - I'm passionate about efficiency and productivity.
   - I love startups. If I don't love startups, then I at least love the intrapreneurial aspect of the Chief of Staff role at larger companies.
   - I like moving fast.
   - I like creating tools, processes, and systems.
   - My energy is drained when I'm doing rote or administrative tasks*

   *Note: Some Chief of Staff roles are scoped to include traditional executive assistant tasks, so this assumes that a candidate with a ton of raw horsepower, executive presence, and top tier skills will be drained by administrative tasks.

2. <u>Skills</u>
   - Management consulting, investment banking, venture capital/private equity, program/project management, or operations experience (usually in tech).
   - Years of experience varies from 0-8 years.
   - Bachelor's degree (MBA usually a plus or preferred)
   - Ability to apply frameworks or first principles to problems and bring structure to ambiguity
   - Strong decision-making, problem-solving, and organizational skills
   - Adaptability, flexibility, and resourcefulness
   - Willingness to roll up your sleeves; no problem is too big or too small
   - Ability to influence without authority
   - Strong communicator, both written and verbal; ideally, prior experience with board and executive communications
   - Ability to thrive in an action-oriented, fast-paced, dynamic work environment
   - Quantitative analysis (e.g. SQL, Google Sheets, Excel, other)
   - Willingness to challenge and ability to "manage up"

3. _Career Values_
   - Challenges
   - Achieving outcomes
   - Learning from my Principal and an all-star executive team
   - Rapid growth
   - Setting up my team for success
   - Helping my Principal or boss shine
   - Being innovative
   - Work autonomy or independence
   - Career progression
   - Some degree of unpredictability, adventure, or risk-taking

4. _Personality Traits_
   Below are The Big 5 Personality Traits of conscientiousness, agreeableness, neuroticism, openness, and extraversion. I've circled the range of sub-traits that are most relevant for the Chief of Staff role. Keep in mind that some adjectives, like "conventional", "conforming", and "simple" are not necessarily bad, but are just better suited for other roles. For example, a nuclear power plant operator might need to be more "conventional" and "conforming" than "curious" or" imaginative" given the degree of compliance that their job demands.

Conscientiousness	Agreeableness	Neuroticism	Openness	Extraversion
Dependable	Kind	Nervous	Curious	Talkative
Organized	Cooperative	Moody	Imaginative	Sociable
Reliable	Sympathetic	Emotional	Creative	Passionate
Ambitious	Helpful	Insecure	Complex	Assertive
Hardworking	Courteous	Jealous	Refined	Bold
Persevering	Warm	Unstable	Sophisticated	Dominant
Careless	Critical	Calm	Uninquisitive	Quiet
Sloppy	Antagonistic	Steady	Conventional	Shy
Inefficient	Callous	Relaxed	Conforming	Inhibited
Negligent	Selfish	At ease	Simple	Bashful
Lazy	Rude	Secure	Unartistic	Reserved
Irresponsible	Cold	Contented	Traditional	Submissive

Self-Assessment and Role Alignment

1. Compare and contrast each of the interests, skills, career values, and personality traits that you listed in Part 1 with those in Part 2. Are there any strong matches that jump out? Is there a particular skill, interest, career value, or personality trait that doesn't match your self-assessment? Why or why not?
2. Keep in mind that each Chief of Staff role is scoped differently, so while a finance background or analytical experience is usually a requirement for the role, for example, there are job opportunities where this experience is not *as* important, though it's rare.
3. There are dozens of personality and career matching tools out there, and while the evaluation or use of such tools is outside the scope of this course, I would like to point you to one of my favorite frameworks: the Ikigai, or the "reason for being". You can read more about how pursuing your ikigai – the confluence of what you love, what the world needs, what you're good at, and what you can be paid for – can be immensely meaningful and fulfilling here.
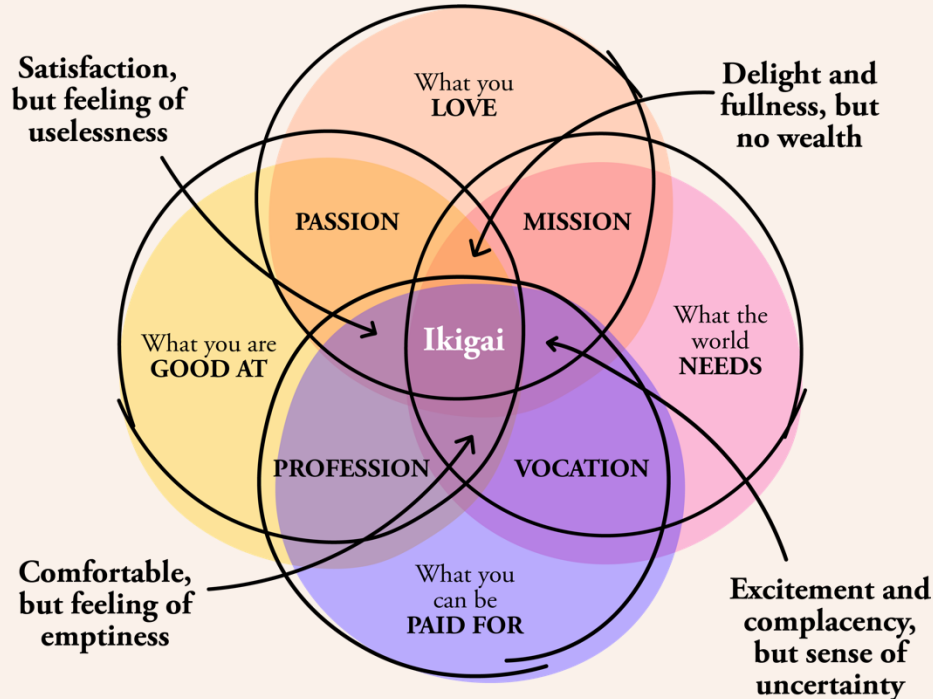
Image adapted from Toronto Star