



THE COUL & GOLD GROUP

CHIEF OF STAFF CAPABILITIES ASSESSMENT

Capabilities *Report*

PREPARED FOR

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This report and its contents are the confidential, proprietary work product of The Coul & Gold Group, provided solely for the use of the named recipient.

SECTION 1

How to Read This Report

Maya, this report is the output of your Chief of Staff Capabilities Assessment. It draws on five sources: how you placed yourself, your work samples, your colleagues' feedback, your leader's written answers, and the interview. Each source contributes evidence across seventeen areas. Where the parts agree, the report states the finding directly. Where they diverge, or where evidence is partial, it names which part showed what, and places nothing on how you rated yourself alone. Your leader, Daniel Reyes, CEO, answered the Leader Questionnaire. The report refers to Daniel by first name from here on.

The assessment answers a different question from a readiness assessment. You already have the job. The question is how well it is going, what is slowing you down, and how much of that belongs to you rather than to the way the role is set up. The seventeen areas sort into four groups.

WHAT THE ROLE RUNS ON

The capabilities that are hardest to develop and that most determine whether this role works for you.

HOW YOU OPERATE

The capabilities that do the core job day to day and develop with exposure.

HOW IT LANDS

The most teachable capabilities, and the fastest to move.

HOW YOU LEAD IN YOUR OWN RIGHT

The capabilities that grow with tenure and separate a strong Chief of Staff from one ready for a bigger role.

WHAT'S IN THIS REPORT

SECTION 1 How to read this report — the parts of the assessment, what each group of areas measures, and what's in each section.

SECTION 2 The headline — the shape of the whole report on one page: where you are strongest, your three development priorities, and what the role itself is making harder.

SECTION 3 Your profile — every area by level, with what the evidence rests on and how you placed yourself beside it, and a narrative for each group.

SECTION 4 Blind spots and hidden strengths — where you and the people around you see things differently, in both directions.

SECTION 5 Your role — the five role conditions, what they explain about your profile, and Daniel's context.

SECTION 6 Your development plan — three priorities, each with practices, signals, and dated first steps, and a route if you want one.

SECTION 7 What to raise with your leader — changes to how the role is set up that the evidence suggests would help.

Everything in this report is confidential and belongs to you. A practitioner set every level and reviewed every finding before delivery. If you want to discuss the findings, your 60-minute debrief comes with the report — details are at the end of Section 6.

SECTION 2

The Headline

YOUR THREE DEVELOPMENT PRIORITIES

Operational Design and Execution Narrative Construction Shaping Strategy

Your foundation is solid. Your colleagues named your steadiness in a tense quarter unprompted, and Daniel described you as the person who gets things moving across the leadership team without borrowing his name. The gaps sit in how you operate and how your work lands: building systems that run without you, and constructing a narrative that makes a decision obvious rather than well-informed. Both are developable with focused effort. Both are also visible to the people around you, which is why they come first.

WHERE YOU ARE STRONGEST

Self-regulation under pressure. Your colleagues, Daniel's answers, and the interview all pointed to the same quarter: the funding round slipped, and you ran the leadership team's cadence at the same tempo throughout.

Operating without a clear mandate. Your colleagues' feedback and the interview showed you moving the pricing review across three functions on your own credibility, and escalating to Daniel exactly once, with a reason.

WHAT IS AT STAKE IN EACH PRIORITY

Operational design and execution. Delivery still depends on you chasing. When you were away in August, the weekly decision log stopped.

Narrative construction. Your papers inform well and decide slowly. Daniel rewrote the framing of two of the three decision papers you sent him this year.

Shaping strategy. You run the planning process well. Daniel could not name a decision your view changed.

WHAT THE ROLE ITSELF IS MAKING HARDER

Your mandate is only partly communicated: Daniel and you agree on your remit, but the leadership team has never heard it from him. That shows up in how often peers check with him before acting on your requests, and Section 6 suggests how to raise it.

SECTION 3

Your Profile

Every area, by level, with what the evidence rests on and how you placed yourself beside it. The levels run from Limiting to Distinctive and are the baseline for re-measurement. Where an area reads *Not placed*, the part that would have placed it was not available, and the table says which. Your own rating never sets a level; it sits beside the evidence so you can compare the two.

AREA	WHERE THE EVIDENCE POINTS	WHAT IT RESTS ON	HOW YOU PLACED YOURSELF
<i>What the role runs on</i>			
Ego management	Strong	your colleagues' feedback, Daniel's answers, and the interview	Solid
Self-regulation under pressure	Strong	your colleagues' feedback and the interview	Strong
Operating without a clear mandate	Solid	your colleagues' feedback and the interview	Solid
Discretion as active judgment	Strong	your colleagues' feedback and the interview	Strong
<i>How you operate</i>			
Anticipating a leader's needs	Strong	Daniel's answers, your work samples, and the interview	Strong
Reading patterns across an organization	Solid	your colleagues' feedback and the interview	Strong
Holding positions under pressure	Solid	Daniel's answers and the interview	Solid
Moving between levels of work	Solid	the interview alone	Strong

AREA	WHERE THE EVIDENCE POINTS	WHAT IT RESTS ON	HOW YOU PLACED YOURSELF
Operational design and execution	Developing	your work samples, your colleagues' feedback, and the interview	Strong See Section 4
<i>How it lands</i>			
Communication range and register	Strong	your work samples, your colleagues' feedback, and the interview	Strong
Stakeholder management	Solid	your colleagues' feedback and the interview	Solid
Narrative construction	Developing	your work samples and the interview	Solid
<i>How you lead in your own right</i>			
Shaping strategy	Developing	Daniel's answers and the interview	Solid
Leading and developing people	Solid	your colleagues' feedback and the interview	Solid
Credibility in your own right	Solid	your colleagues' feedback and the interview	Developing
Commercial judgment	Solid	the interview alone	Solid
Leading change	Solid	your colleagues' feedback and the interview	Solid

WHAT THE ROLE RUNS ON

What the role runs on. The foundation is in place and the people around you can see it. The strongest area is self-regulation under pressure: your colleagues described the delayed funding round as the quarter when you were the steady point in the room, and Daniel named the same weeks. The least settled area is operating without a clear mandate, and the reason is mostly structural. Where Daniel

had announced your role, as on the pricing review, you moved three functions without invoking him. Where he had not, peers checked with him first. That costs you about a week on every cross-functional ask, by your own count. Section 4 explains why that gap belongs mainly to the role.

HOW YOU OPERATE

How you operate. Anticipation leads this group. Daniel said he was surprised by a board question twice in the last year, and both times you had the answer in his folder before the meeting. Operational design and execution is the clear gap. Your work samples show a well-designed planning cycle, but your colleagues said that things you set up keep running only while you chase them, and in the interview you named what breaks when you are away: the decision log, the pre-read deadline, and the follow-up on actions. You placed yourself two levels above where the evidence sits, which is why it leads Section 3.

HOW IT LANDS

How it lands. Your register adjusts cleanly: the all-hands note and the board memo in your samples read like two different writers who share one brain, and your colleagues said they rarely need to ask what you meant. Narrative construction is the gap, and it is specific. Both decision papers summarize the options thoroughly and leave the choice to the reader. In the interview you could say what each paper included but not what you had left out, and the second paper went to Daniel at nine pages. Readers finished better informed and no closer to a decision.

HOW YOU LEAD IN YOUR OWN RIGHT

How you lead in your own right. You are in the second year of a first Chief of Staff role, and Developing or Solid is typical at this stage. Credibility in your own right is further along than you think: your colleagues said people take your view seriously in senior forums whether or not it is Daniel's, and you placed yourself a level below that. Shaping strategy is the growth edge. You run the planning process well, and Daniel said you bring ideas, but when asked to name a decision or priority he changed because of your view, he could not. The interview matched that. Your contribution arrives when asked, and it arrives as options rather than as a position.

BEYOND THE AREAS ASSESSED

In the interview you said you find it hard to stop working on a problem once you have started, and that you often finish a colleague's task yourself because it is faster. That habit is part of why the systems in your office depend on you. It matters in this role because the job is to build things that run without you, and the instinct to finish them yourself works against that every week.

SECTION 4

Blind Spots and Hidden Strengths

Every area where your rating and the evidence differ by two levels or more, in either direction. A difference is useful information, not a mark against you.

BLIND SPOT

01 Operational Design and Execution

How you placed yourself: Strong. The evidence points to Developing.

What the evidence showed: Your work samples show a planning cycle you designed well. Your colleagues said that what you set up keeps running only while you chase it, and in the interview you listed three things that stopped when you were away in August. The design is there; the system that keeps it running without you is not. In this role the difference decides whether the office scales past you. Closing the gap means building the handoffs, owners, and defaults that make your absence uneventful, and then testing it by taking a week off.

HIDDEN STRENGTH

02 Credibility in Your Own Right

How you placed yourself: Developing. Others see more than you do: the evidence points to Solid.

What the evidence showed: Your colleagues said people take your view seriously in senior forums in its own right, and two of them described a leadership-team meeting you ran without Daniel where the room followed your framing. You placed yourself a level below that. It matters because you are currently asking permission for rooms you could already lead, and because it changes what you can claim when the next role comes up.

SECTION 5

Your Role

This section separates what is yours to change from what the role makes hard. We never score role conditions against you. They explain the profile, and they decide which gaps are yours, which are the role's, and which are shared.

CONDITION	RATING	WHAT WE FOUND
How clear your mandate is	Mixed	You and Daniel describe the remit the same way. The leadership team has never heard it from him, and two of your colleagues said they are unsure what you can decide on his behalf.
Your access to and backing from Daniel	Enabling	A protected weekly hour, a seat in every forum you need, and a public defense of your call on the vendor exit.
How Daniel's way of working affects your role	Mixed	Clear asks and steady under pressure. Priorities shift about twice a month after work is under way, which makes it harder to build systems that last.
Your scope and load	Enabling	One coherent job, resourced with two direct reports. Sustainable, by your account and your colleagues'.
What is happening in the organization	Mixed	A delayed funding round and a new CFO in the last twelve months, with the rest of the leadership team stable.

WHAT THIS MEANS FOR YOUR PROFILE

Operational design and execution is mainly yours to change. The habit of finishing things yourself shows up across your colleagues' feedback, your own account, and the planning cycle you built, including in the parts of the role Daniel has set up well. Narrative construction is also yours: the same pattern appears in both samples, whoever the reader was. Operating without a clear mandate is partly a finding about your role. Where Daniel announced what you could decide, you decided; where he did not, your peers went to him first. Twice-monthly shifts in priorities make the systems gap harder, but they do not explain it.

DANIEL'S CONTEXT

Founder-CEO, scaling

A scaling founder-CEO calls most on anticipating a leader's needs, operating without a clear mandate, operational design and execution, and narrative construction. Your profile matches on the first and is strongest where Daniel has cleared the ground. The two gaps in your plan are the two this context forgives least: a scaling organization needs systems that run without the Chief of Staff and papers that let a founder decide fast.

SECTION 6

Your Development Plan

Three priorities, chosen by the evidence and in this order. Each names what it is costing now, what the next level looks like for you, the practices that build it, the signals other people would notice, and a first step with a date. Role-attributed gaps are not here; they sit in Section 5 and Section 7.

PRIORITY 1 · DEVELOPING TODAY

01 Operational Design and Execution

Why this one: The operating rhythm you designed is good, and it depends on you to run. Every week you are out, the decision log stalls and the pre-read deadline slips, which costs Daniel a slower leadership-team meeting and costs you a reputation for systems that only work with you in the room.

What Solid looks like for you: Solid looks like an operating rhythm with a named owner for each step, a default that runs when you are absent, and at least one structure you built that colleagues describe as running without you.

Practices that build it: Pick the three things that broke in August. For each, write the owner, the trigger, and the default, and hand it to the owner in person with the standard you expect. For the next six weeks, when a task comes back to you half done, return it with one question instead of finishing it. Keep a tally of how often you broke the rule. Ask your two direct reports, after the next leadership-team cycle, which part of the rhythm they ran without you and which part they still waited for you on.

How you will know it is moving: Daniel stops asking where the decision log is. A colleague says, unprompted, that something kept running while you were away.

First steps: *In the next two weeks:* Write the owner, trigger, and default for the decision log, the pre-read deadline, and the action follow-up, and hand each to its owner. *By February 2027:* Take a full week away from the rhythm and record what ran and what did not.

PRIORITY 2 · DEVELOPING TODAY

02 Narrative Construction

Why this one: Your papers inform well and decide slowly. Daniel rewrote the framing on two of three decision papers this year, and the vendor paper ran to nine pages. Each rewrite costs him an evening and costs you the chance to set the frame yourself.

What Solid looks like for you: Solid looks like a paper that opens with the choice and the recommendation, keeps the detail in an appendix, and survives questions from the person who knows the numbers best.

Practices that build it: Before writing the next paper, write the one sentence Daniel should be able to say after reading it. If you cannot write that sentence, the paper is not ready. Cut each paper to two pages before it goes to Daniel, and keep a list of what you cut. The list is the skill. Ask the new CFO to read your next decision paper for ten minutes and tell you where she stopped believing it.

How you will know it is moving: Daniel sends one of your papers to the board unedited. A decision closes in the meeting it was written for.

First steps: *In the next two weeks:* Rewrite the vendor paper to two pages with the recommendation in the first paragraph, and compare the two versions with Daniel. *By February 2027:* Have three papers behind you that went out at two pages with no rewrite of the framing.

PRIORITY 3 · DEVELOPING TODAY

03 Shaping Strategy

Why this one: You run the planning process well and bring ideas when asked. Daniel could not name a decision your view changed, and neither could you under questioning. The role's value compounds when you make his thinking better, not only faster, and right now it is mostly faster.

What Solid looks like for you: Solid looks like a view on priorities you offer unprompted, with evidence behind it, some of which changes a decision, and at least one argument about what the organization should stop doing.

Practices that build it: At each planning checkpoint, bring one position, not a set of options, and say what you would stop. Record whether it changed anything. Keep a running list of the three things you believe the organization should stop doing and why. Review it with Daniel once a quarter. When the new CFO publishes the next forecast, write your own one-page read of what it means for priorities before you see Daniel's.

How you will know it is moving: Daniel names a priority he changed because of your view. You can name what you argued the organization should stop doing, and what happened.

First steps: *In the next two weeks:* Write your stop list and bring one item from it to the next planning checkpoint as a position. *By February 2027:* Have one decision on record that changed because of a view you brought unprompted.

Alongside your priorities: Alongside your priorities, the habit you named in the interview, finishing things yourself because it is faster, is worth watching separately. It is not a fourth priority. It is the reason the first one exists, and the six-week tally in that priority is the practice for it.

THE COUL & GOLD CHIEF OF STAFF OPERATING PROGRAM

If you want support with this, The Coul & Gold Group runs the CoS Operating Program: a twelve-week cohort for Chiefs of Staff in the role, shaped around the development areas its participants bring.

We recommend re-measurement in August 2027. It repeats how you placed yourself, your colleagues' feedback, Daniel's questions, and a shorter interview, so you can see what has moved. Your 60-minute debrief with Suzi Coul comes with this report — please book it within four weeks.

SECTION 7

What to Raise With Your Leader

These are changes to how your role is set up that the evidence suggests would help. Whether and how you raise them is your call.

Agree a written remit and have Daniel share it with the leadership team. Two of your colleagues are unsure what you can decide on Daniel's behalf, and peers go to him first on asks he has not announced. A way to put it: "I would like us to write down what I can decide, and I would like you to tell the leadership team, so they stop checking with you on things you have already delegated to me."

A fixed point in the month for priority changes, outside live work. Priorities shift about twice a month after work is under way, and each shift restarts a cycle you are trying to make run without you. A way to put it: "When a priority changes mid-cycle, could we batch it to the planning checkpoint unless it is urgent? It would let the systems I am building settle for a full cycle."

WHERE YOU AND DANIEL SEE THE ROLE DIFFERENTLY

Daniel describes your remit as the operating rhythm, the board, and special projects. You describe it as the operating rhythm, the board, special projects, and the leadership team's people decisions. The fourth item is where most of the friction with peers has sat this year.