

THE COUL & GOLD GROUP · PRACTITIONER TOOLKIT NO.02

The Chief of Staff Job Description Architecture Worksheet

A guide for the executives who write Chief of Staff job descriptions, and the Chiefs of Staff who have to read them.

THE COUL & GOLD GROUP

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HOW TO USE THIS WORKSHEET

A structured way to read a role

Most Chief of Staff job descriptions are written in a hurry by someone who has never had a Chief of Staff, copying language from a posting they Googled at 11pm. The result is a document that reads like a wishlist for a sentient calendar, and produces hires that were doomed before their first Monday.

This worksheet is not a template. It is a way to notice what is already in front of you - the structural choices a JD either makes or avoids, and what the avoidance costs.

Part One is for the executive doing the hiring. Part Two is for the candidate reading the JD. Each side stands on its own. If you are hiring, the candidate side is also worth your time. It is what good candidates will be doing as they read what you wrote.

PART ONE

For the Executive Doing the Hiring

Ten design questions. Answer them in order. The earlier ones determine whether the later ones are even the right questions to ask. If you cannot answer them, you do not have a job description. You have a vibe.

QUESTION 01 · WHY NOW

Why does this role exist right now?

Not why a Chief of Staff sounds appealing. Why now, in your organization, with the specific friction you are experiencing.

Write one sentence. If it takes more than one, you have either two roles or no role.

Then test it against three filters:

- Is the answer a person problem dressed up as a structural one? “My COO isn’t communicating with me” is not a CoS problem.
- Is the answer something a great executive assistant could solve? If yes, hire one. They cost less and you will be happier.
- Is the answer something a department head should own? If yes, hire or promote that person.

If the role survives all three, it is probably a real CoS need. Continue.

QUESTION 02 · THE THREE FUNCTIONS

Which of the three functions are you actually hiring for?

Every Chief of Staff role is some weighted blend of three functions. Most JDs pretend it is all three at full strength. That is how you end up with a role no human can do.

Assign a percentage to each function. They must add to 100. If one falls below 15%, redistribute that share to the other two and remove the function from the JD entirely. Anything kept below 15% becomes invisible work that gets blamed when it is missing.

- Strategic partner. Thinks with you, pressure-tests decisions, owns the work behind the work.
- Operational integrator. Owns the operating rhythm, the meeting cadence, the cross-functional decision flow.
- Special projects lead. Owns the work that does not fit anywhere else. The new business line, the integration, the board prep.

Your allocation:

Function	% of role	Who loses if this is missed
Strategic partner	___ %	
Operational integrator	___ %	
Special projects lead	___ %	

QUESTION 03 · AUTHORITY

What authority does this role actually carry?

Authority is not a vibe. It is a set of decisions a role can make without checking with you first.

Specify three categories:

- Decisions this role makes alone. Name them. “Owns the executive team meeting agenda” counts. “Helps with strategy” does not.
- Decisions this role makes with you. Be specific about what “with” means - drafts and you approve, or co-authors and you both sign?
- Decisions this role surfaces but does not make. The role’s information rights. What it can see, sit in on, and weigh in on without owning the call.

If you cannot fill in the first category with at least three specific decisions, you are not hiring a Chief of Staff. You are hiring an assistant with a more expensive title.

QUESTION 04 · THE ORG CHART QUESTION

Who does this role outrank, and on what?

The CoS does not appear on the org chart with a clean answer to this question. But you must answer it for yourself, or it gets decided by whoever is loudest in the first conflict.

Be specific about each of the following:

- Whether the CoS speaks for you in your absence. On what topics. To whom.
- Whether the CoS can give direction to your direct reports. On what kinds of work. With what pushback rights for them.
- Whether the CoS sits in your one-on-ones. With which leaders. With or without the leader's consent.
- Whether the CoS reviews work product before it reaches you. From which functions.

None of these answers is right or wrong in the abstract. All of them are wrong if they are left unsaid.

QUESTION 05 · THE INTRODUCTION

How will you introduce this person?

The introduction is half the role. A Chief of Staff introduced as your “right hand” by an executive who does not quite mean it will spend their first 90 days fighting for authority that should have been baked in on day one.

Before you post the job, write the email or All-Hands script you will send when this person starts. Three to four sentences. It must answer:

- What does this person own?
- What changes for the people reading the email?
- How should they treat a request from this person versus a request from you?

If you cannot write that paragraph in plain language, you have not designed the role. Do not post the JD until you can.

QUESTION 06 · WHAT YOU WILL STOP DOING

What will you give up?

This is the question the rest of the worksheet rests on. If the answer is “nothing,” the rest of the worksheet is academic.

A Chief of Staff is not an addition to your operation. The role only works if you give something up. Meetings you currently run. Decisions you currently make. Work you currently put your hands on. If nothing leaves yours, the new hire becomes someone who watches you do all of it and writes it down. That is not a Chief of Staff. That is an expensive shadow.

Most executives find this question harder than they expected. The instinct is to think about what the new person will do. The harder problem is what you will stop doing - and only one of those tests whether you are actually ready to hire.

Three patterns reliably break this stage. They look like progress. They are not.

The pseudo-handover. You name the work but stay in the room for it. You sit in on the meeting you said you would no longer chair. You copy yourself on the email thread you said you would no longer drive. The CoS gets accountability without authority, and learns within weeks that the handover is theater. So does everyone else.

The take-back. You hand it over. A week later something goes wrong, or feels like it might, and you take it back without saying so. The CoS does not get a clean signal - they get a moving line. They start optimizing for which of your handovers might be retracted, which is not a job anyone can do well.

The “check with me first” trap. You hand it over with a footnote: just run things by me before you act. The footnote eats the role. The CoS becomes a coordinator of your decisions rather than the owner of any.

If you are doing any of the three, the role is not yet designed. Pause and answer the question.

List five things you will hand over within the first 90 days. Not delegate. Not collaborate on. Hand over. For each one, name the day-one signal that the handover has actually happened - the meeting you no longer attend, the email thread you no longer appear on, the decision you no longer get pinged for.

If you cannot name five, you are not ready to hire a Chief of Staff. You are ready to hire an executive assistant, or you are ready to do nothing. Both are honest answers, and both cost less than getting this question wrong.

Your five:

What I will hand over	What handover looks like on day one	What take-back would look like (and what I will do if I notice it)
1.		
2.		

3.		
4.		
5.		

QUESTION 07 · SUCCESS

What does success look like at 90, 180, and 365 days?

Not OKRs. Not deliverables. Outcomes you would be able to feel in how the organization runs.

Examples that work: “Our executive team makes decisions in the room instead of taking them offline.” “I am no longer the bottleneck on board prep.” “Cross-functional projects do not require my intervention to move.”

Examples that do not: “Manage special projects.” “Improve operational efficiency.” “Be a thought partner.” These describe activity, not outcome - which is a way of saying that everyone can have an opinion about whether you are succeeding, and no one has to commit to an answer.

QUESTION 08 · INFORMATION ACCESS

What information does this role have access to?

Information access is authority by another name. A Chief of Staff who cannot see the cap table cannot help with the board. A CoS without a clear NDA structure is a legal exposure waiting to happen.

Be specific about the following:

- Board materials and pre-reads. Read-only, edit, or co-author?
- Compensation data, for the executive team, the company, or none?
- Personnel files and performance reviews. Sit in, read after, or excluded?
- Investor communications and the cap table.
- Your personal calendar, inbox, and direct messages, and on what terms.

If the answer to most of these is “we will see how it goes,” you are designing a role whose authority will be litigated in real time. Decide now.

QUESTION 09 · WHERE THE WORK HAPPENS

Where will this person work?

Remote, hybrid, or in-person is no longer a perk question. It is a structural design question, and the answer changes which version of the role is even possible.

The honest read by function:

- If the role is heavily operational integrator, in-person matters more than the JD usually admits. Much of the work is reading rooms, catching hallway tells, and being in the meeting before the meeting.
- If the role is heavily strategic partner, remote can work. But only if you are genuinely available on the channels you say you are. “Weekly calls” is not a working arrangement.
- If the role is special projects lead, remote works for most projects, and breaks for the ones requiring real-time coordination. Be honest about which kind of project this role will actually own.

Whatever you decide, write it down. “Flexible” is not an answer. It is a deferral.

QUESTION 10 · THE LONG VIEW

What does this role look like in year three?

Most CoS hiring conversations stop at year one. That is how you end up with roles people outgrow rather than grow into.

If this role is doing what you hope, what does it look like in three years? Bigger scope, same scope with deeper authority, a team underneath it? More compensation tied to what?

You do not need a five-year plan. You need to be able to picture the role still existing, and still being a good job, three years from now. If you can, say so. If you cannot, say that too. Either is honest. Silence is not.

PART TWO

For the Chief of Staff Reading the JD

A job description is a primary source. The most diagnostic information in it is in what is not there. Read it the way an investigator reads one - in the absences, the hedges, and the verbs that have been chosen to avoid commitment.

DIAGNOSTIC ONE

Is the role real?

Look for these markers. Each present marker is one point. Each missing marker is a question to ask in the interview, and a yellow flag if the answer is hand-wavy.

Structural marker	Present	Missing
The reporting line is named, and it is the principal, not HR, not the COO.	<input type="checkbox"/>	<input type="checkbox"/>
The role's relationship to the executive team is described, not implied.	<input type="checkbox"/>	<input type="checkbox"/>
The JD names at least three specific decisions the CoS will own.	<input type="checkbox"/>	<input type="checkbox"/>
The phrase "thought partner" appears, but it is not the entire job.	<input type="checkbox"/>	<input type="checkbox"/>
There is at least one outcome metric, not just a list of activities.	<input type="checkbox"/>	<input type="checkbox"/>
Strategic, operational, and project work are weighted, not lumped together.	<input type="checkbox"/>	<input type="checkbox"/>

There is evidence the principal has thought about what they will stop doing.	<input type="checkbox"/>	<input type="checkbox"/>
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5-7 present: this is a designed role. 3-4: salvageable, but you will need to do design work in the interview process. 0-2: walk.

DIAGNOSTIC TWO

What kind of CoS do they actually want?

Every JD reveals which of the three functions the principal is really hiring for, even when they claim to want all three. Read between the lines.

If the JD emphasizes...	They actually want...	Which means...
Calendaring, inbox triage, travel logistics, meeting prep	A senior executive assistant	If you take it as a CoS, you will be measured on EA work and judged on CoS work. You will lose.
“Thought partner,” “trusted advisor,” “sounding board”	A confidant	Real, but lonely. Authority is informal. Tenure depends on personal chemistry. Ask what happens when you disagree with them.
Cross-functional coordination, operating cadence, leadership team meetings	An operational integrator	The most stable version of the role. Make sure the COO (if there is one) is bought in. This is where the territorial knife fights happen.
Special projects, M&A, board prep, new initiatives	A special projects lead	Often the most strategic version. Ask what happens between projects. “Other duties as assigned” is the trap.
All of the above, with no weighting	They do not know yet	Not necessarily disqualifying. But you will be designing the role yourself in the first 90 days. Price that in.

DIAGNOSTIC THREE

Who introduced the idea of this role?

The single best predictor of whether a CoS role will work is who pushed for it - and most JDs do not say. The question is rarely answerable from the document itself. Below are the four origin stories. Below those, the proxies that let you read for the answer when no one will tell you directly.

The four origin stories

The principal woke up and decided. Best case. They have skin in the game. They will defend the role.

The board insisted. Workable, but the principal may resent it. The role can succeed; it usually requires the CoS to win the principal over twice - once at hire, and again over the first 90 days.

An outgoing leader recommended it on their way out. Often a parting gift, well-intentioned, half-designed. The question to ask is who is sponsoring the role now that the original advocate is gone.

HR or a consultant suggested it as a fix for executive bandwidth. The principal may not actually want a Chief of Staff. They may want their workload to vanish. These are different problems.

What each origin looks like in the JD

Verbs reveal sponsorship more reliably than language about the role itself. The exercise is to read the JD with a colored pen and underline every action verb attached to the CoS.

- Principal-driven roles tend to use ownership verbs: own, drive, lead, decide. The principal has thought about what the person will do because they have thought about what they will hand over.
- Board- or consultant-driven roles tend to use compliance verbs: support, coordinate, assist, facilitate. The role has been designed to demonstrate that something is being done about executive bandwidth, which is a different task to designing a role.

A JD with five ownership verbs and one specific decision named is a different document to a JD with five compliance verbs and a long activity list. They look similar at a glance. They produce very different jobs.

What each origin looks like in the interview

If the JD is ambiguous, the first interview tells you. Watch for these signals.

Who attends. If the first conversation is with HR or a search partner and not the principal, the principal has not yet bought into the design work. If the principal attends but cannot stay for the whole hour, the role is not their priority.

How they describe the work. A principal who has thought about the role describes it with examples - specific meetings they want help with, specific decisions they want pressure-tested. A principal whose role was suggested to them describes it generically.

Whose problem they are solving. Listen for “I” versus “we” versus “the team.” Principal-driven roles are usually about something the principal personally needs. Board-driven roles are usually framed as something “the team” needs - which may or may not include the principal in their own diagnosis.

How they describe the previous CoS, if there was one. Principals who have worked with a CoS describe them as a partner. Principals who inherited a CoS describe them as a function. The two will be different to work for.

The question to ask anyway

In the first interview: “Walk me through how this role came together.”

It is a softer question than “whose idea was it,” and harder to deflect. The answer is usually the truth - either because they will tell you, or because the way they avoid the question reveals which of the four origins applies.

DIAGNOSTIC FOUR

The introduction test

In the first or second interview, ask this question, verbatim: “How will you introduce me to the executive team on day one?”

There are three good answers and three bad ones.

Good answers

- They have already drafted it and can describe it specifically.
- They have not drafted it but immediately ask, “How would you want to be introduced?” They understand the introduction is part of the design.
- They name a specific person they will introduce you to first, and explain why.

Bad answers

- “I’ll just send a Slack.”
- “They’ll figure it out.”
- “My right hand.” See: every CoS who has watched a C-suite hear “assistant.”

THE RED-FLAG PATTERNS

What to walk away from

Any single one of these is a yellow flag. Two together is a red flag. Three is a sign the role will not survive its first year. Be honest about what you see.

The 47-bullet job description

Every responsibility you can imagine, none weighted. This is not a role; it is a list of everything the principal wishes someone else would do. You cannot succeed at all of it. You will be judged for failing at the parts they care about most, which they have not told you.

“Manage executive calendar” alongside “drive enterprise strategy”

The role is two roles. You will do one of them well and one badly, and the principal will be disappointed about whichever one is not getting attention this week.

No reporting line, or a reporting line that is not the principal

If the JD has the CoS reporting to the COO, HR, or “the executive team,” the role’s authority will be borrowed at best and contested at worst. The CoS reports to the principal. Always. If they do not, it is not a CoS role.

The salary band is significantly below market

Not because the money matters most, but because compensation is a signal of how the role is valued internally. A CoS paid like a senior manager will be treated like one.

“Other duties as assigned” is doing real work in the JD

Every JD has this line. The question is whether it is a footnote or load-bearing. If the meaty responsibilities are vague and the catch-all is doing the heavy lifting, the role has not been designed.

No mention of the executive team

A CoS who is not connected to the rest of the leadership team is a CoS the rest of the leadership team will route around. If the JD treats the role as the principal’s private project, the principal probably treats it that way too.

The previous CoS lasted less than 18 months, and no one will tell you why

Always ask. The honest answer (“it was not a fit,” “they took an outside opportunity,” “we restructured”) is fine. The vague answer (“things just didn’t work out”) is the problem. CoS roles fail for structural reasons, not personality reasons. If they cannot name the structural reason, they have not fixed it.

The principal has had three Chiefs of Staff in five years

It is not the candidates. It is the design. Walk.

The interview process does not include the executive team

If you do not meet the people you will be coordinating, two things are true: you cannot assess whether the role is workable, and they have no investment in your success. You will arrive as a stranger they did not approve.

“You will have a lot of autonomy” with no specifics

Autonomy is not a culture. It is a set of decisions you can make without asking. If they cannot name the decisions, the autonomy is not real - it is what you will be told you have, until the first time you use it.

FINAL ROUND

The questions to ask before you say yes

If the JD passes the diagnostics and survives the red-flag scan, here are ten questions for the final round. The quality of the answers matters more than the answers themselves. For four of them, listen specifically for what a good and a bad answer sounds like.

- 01.** What is the one thing you most want to stop doing once I start?
- 02.** Who on your leadership team is most enthusiastic about this hire? Who is most skeptical? Why?
- 03.** When we disagree, how does that get resolved?

Good: a process they actually follow. “I hear you out, then I decide. If you think I’m wrong, you say so once more in private and we move on.” Specific. Repeatable. Bad: “We figure it out”, or “You defer to me on the big stuff,” without naming what counts as big. A principal who has not thought about disagreement is one who has not stress-tested the partnership.

- 04.** What did your last CoS do well? What did they do badly? What would you do differently in how you set them up?

Good: specific on both sides, and the third part of the answer takes some responsibility for the design. “I didn’t protect their authority enough in the first month” is a useful answer. Bad: blame on the predecessor with no reflection on the role architecture. If the principal cannot name a structural mistake of their own, they have not fixed it - and you will repeat it.

- 05.** If I needed to give direction to one of your direct reports in your absence, would you back me up - even if they pushed back to you privately?

Good: yes, with named conditions. "On anything we have already discussed, yes. On something new, I want a heads-up first." That is workable. Bad: "Depends on the situation" without specifics. That sentence becomes the line they negotiate with you in real time, every time, in front of the people you are trying to work with.

- 06.** What is a decision you would want me to make without checking? What is one you would want me to surface but not make?
- 07.** What information will I have access to from day one - board materials, comp data, your inbox, personnel files? And what is explicitly off-limits?
- 08.** Where do you expect this role to be done from, and why? If it is hybrid, what does in-person actually look like?
- 09.** How will I know, in six months, whether this is working - for both of us?

Good: names the signals, on both sides. The principal has already imagined how they will feel if it is going well, and how they will feel if it is not - and how they will tell you. There is a feedback mechanism named, not just a calendar review. Bad: "We'll know," or a six-month review with no description of what gets reviewed. That is a delayed referendum, not a feedback loop.

- 10.** What does this role look like in three years if it is going well? Bigger scope, deeper authority, a team underneath it - what is the picture?

A NOTE ON USE

A well-architected JD does not guarantee a great role.

But a structurally broken JD almost always produces a structurally broken role. The hiring side of this document is the design work most executives skip. The candidate side is the diagnostic work most candidates do not know to do.

Both sides are protecting the same thing: a role that, when it works, returns its cost many times over - and when it fails, takes a year of organizational momentum with it. That is not a salary calculation. It is an architecture one.

If you are using this worksheet, you are likely past the point where vague is acceptable. That is the point. Be specific - on paper, on purpose, before anyone else has to read between the lines.

FOR DEEPER WORK

The Job Description Architecture Worksheet is the entry point to a structured read of a Chief of Staff role: how it has been designed, how it will be experienced, and what it will return. To request a structured advisory engagement on a specific hire or evaluation, get in touch at coulandgold.com.