



CHAPTER ONE

A PRESCRIPTION FOR A SUCCESSFUL CSE

Cheryl O. Ronk, CMP, FASAE, CAE, and Susan S. Radwan,
SMP, ARM, CAE

The success of chief staff executives (CSEs) can be tied to perspective and focus more than anything else. The CSE's perspective—the way of thinking about himself or herself, others, the team, the organization, and the positioning of the organization—is a key variable for success.

Perspective and focus alone, however, will not carry a leader. The CSE needs knowledge of association concepts and strategies while fostering important connections to provide for long-term success. CSEs must possess qualities that lead others toward a preferred future for the industry or profession. The CSE plays the pivot position to communicate, direct, and manage staff and volunteers, plus work with other entities as partners, collaborators, and contributors toward the preferred future.

What makes a successful chief staff executive? Many individuals who should be very successful, according to their credentials on paper, fail within an association culture. Yet others who did not hold comparative credentials to other candidates identified in the search process grew into very successful CSEs. There is no one magical element or combination. It is a combination of perspective, personal traits, knowledge, experience, communication style, and fit with the organizational culture that results in success.



What Does an Association Buy in a CSE?

When an organization selects a chief staff executive, what are they purchasing? Think about it. A scanner? A planner? A visionary? A leader? Consider the idea that they purchase culture and judgment.

The culture for the organization and the industry as a whole is heavily influenced by the long-term CSE. The CSE is responsible for the aligned values and vision across the whole organization: board, staff, and membership. The CSE's personal and professional values show through and set the tone for ethical behavior and organizational integrity. Staff asks for direction; the board asks for judgment. This judgment influences the culture and ultimately the brand of the organization.



Unique Position

One of the key elements of successful chief staff executives is that they understand their positioning within the organization. The board has primary authority and secondary commitment for the association. The CSE has the primary commitment and secondary authority for decisions made. It is critical for a CSE to understand this dynamic, recognize the appropriate role that needs to be played, and leverage the value that role can provide.

Inside this unique position, a CSE needs to offer the board and staff a skill set beyond being an “expert” in a particular area of association management or industry expertise. Savvy CSEs establish the role in the following ways:

- They evaluate and recommend strategy based on alignment to the mission.
- They collect, evaluate, analyze, and make meaning of relevant data.
- They determine positioning and present recommendations to the board.
- They recognize the role of and plan for an appropriately sequenced process that yields board and member support.
- They build effective work teams and ensure a productive work environment.

These avenues make for better strategic decision making and stronger member buy-in.

Board Partner

The board and CSE are partners, with specific roles inside the partnership. The CSE implements the ideas of the board, which is accountable for its governance to the members.

Appropriately, the CSE brings ideas to the board to advance and position the association. A successful CSE ensures that board members are informed about the direction and achievements within the strategic plan, the capacity and efforts to expand the talent pool, and pursuits to enhance the industry or profession as a whole.

Much of the CSE's role is about working *on* the association so that it is relevant, efficient, and effective. The CSE often facilitates the board's work to create the *what* for the organization (for example, What is the preferred future? What strategies will be most effective? What values are important to our culture? What is member return on investment?) The CSE then works with staff on creating the *how*, or the means, to achieve the outcomes defined by the board. The CSE is the linchpin that keeps both alignment and focus on the right work. In essence, the CSE's role is synonymous with organizational performance.

Changing CSE Role

Not too long ago, to be successful, one had to know the other players in his or her industry; the association connection was the place to do just that. If you wanted referrals, you had to meet and greet. Who you knew was essential for effective communication and partnerships. Being elected to the board of an association equated to being at the top of your field. It was the ultimate recognition in the profession.

Over two decades ago, associations had a unique niche often related to why they were formed. Their "golden-handcuff" (affinity) programs were a guarantee of sustainability. Associations represented their members in the public policy, regulatory, or collective-bargaining arenas. The niche was driven by the members as a collective group, and the association only served specific needs that could be solved better together.

The formula for success was to follow a traditional association business model. For example, an association had to have a communications vehicle, a website, member education, a trade show, a public policy agenda, and the like.



Now we have moved to intensely analyzing what the members need and delivering it. The name of the game is “mass customization.” Thus the successful CSE has to know what can be delivered from an entrepreneurial perspective, listen for member needs, and provide solutions.

We live in a nonstop, dynamic environment in which we have few models to follow. It is even more important now to not only listen to members but also “read between the lines” and create member-supported solutions. It is equally important to know what is changing in the environment that will significantly affect members and the association as an entity so that you can prepare to meet the demands of that future state.

This requires a way of thinking that considers the association’s relationship to allied associations around the world, regulators, legislators, and global partners. A CSE needs to focus on global competitiveness and strategic positioning of the association.

It is essential to become an organizational designer. How the organization looked ten years or even four years ago may not be right any more. The CSE has to continuously scan the environment, prioritize strategies, and evaluate opportunities. Just because another organization is providing a specific service does not mean it is the right fit for your organization. In fact, if another organization is doing it, what should your organization do differently? What is your differentiated value proposition in the marketplace?

To be an effective organizational designer one has to be open to innovations from other industries or professions. Interacting with peers at the local, state, and national levels, industry leaders and leaders from other sectors through your association executive community, leads to the possibility of cross-pollination. As a CSE, it is essential to learn from others outside the profession you represent. To build on the brilliance of others, you have to reach out beyond your regular networks.

Consider the story of the chief executive officer of Federal Express who, during a business trip, visited a grocery industry trade show. He was introduced to barcode technology at this event, which at the time was primarily marketed to grocers. Tracking packages appeared soon afterward and is still one of the elements of FedEx’s success. He saw the innovation as relevant for his own industry and leveraged the opportunity.

Staying within the same circles and hearing the same stories will get you the same results.



Deliver Results

Today, CSEs are asked to deliver results, not just activity—or reports on activity via dashboards or other means. Understanding the return on investment (ROI) for divergent stakeholders and communicating that ROI is essential in today's competitive environment. ROI communication can only be directed from the top of the organization.

Since today is different from yesterday, and tomorrow will be different from today, successful CSEs must have intentional learning about their personal and professional growth. Some CSEs believe they know all there is to learn and could teach other executives about leadership. Really? Do we ever truly master this profession? Savvy CSEs see the value of continual learning. Like the medical and legal professions, perhaps we should “practice” leadership. “Practice” means repetition, learning from the experience, and mastering technique; in other words, continual learning and coaching. Part of that “practice” might include gathering new tools to drive excellence in the field, being curious about how others think and achieve results, and being open to new perspectives that might optimize results.

Beacon to Others

As previously mentioned, the CSE is the linchpin that keeps both alignment and focus on the right work. The long-time CSE is the individual who is often in place longer than any board leader. The CSE must provide for continuity between volunteers and staff members who come and go. The long-term CSE provides stability to the organization and holds its institutional wisdom.

This wisdom recognizes the big picture of how a strategic plan builds upon previous success, and the CSE's perspective, if shared, can assist volunteers and staff in understanding how everything fits together. Leadership is essential in the CSE position, for it is the only position there is to create total alignment among the board, committees, task forces, and staff.

The CSE is compensated for creating the culture to achieve the preferred future, to make the judgments on how to accomplish it, and what opportunities should be considered to maintain the nimbleness of



the organization. This high-level thought process is the accountability of the CSE.



Emotional Intelligence

A CSE with high emotional intelligence makes everyone better. That “model from the top” inspires both volunteers and staff to become continually better.

In general, emotional intelligence is the ability to practice ethical behavior, honesty, and integrity with yourself and others. According to social scientists, emotional intelligence includes

1. Knowing one’s emotions; in other words, self-awareness.
2. Managing those emotions, which includes handling feelings in a way that is appropriate to the context of your situation.
3. Motivating oneself, operating from a place of emotional self-control—delaying gratification and stifling impulsiveness.
4. Recognizing emotions in others and practicing empathy.
5. Handling relationships, maintaining trustworthiness throughout the course of those relationships.

Those with high emotional intelligence understand the difference between authority and responsibility and expect themselves and others to be accountable for the proper use of authority.



Think Like a CSE: How You Think Is How You Lead Is How You Act!

From the top of the operational organization, a CSE has a unique position in the responsibility for the whole organization. To be successful, the CSE must hold the whole organization as his or her primary concern rather than favor one department over another. The CSE needs to be concerned about maximizing the whole by optimizing the parts of the association, rather than maximizing parts only to diminish the impact of the whole.

For example, in the budgeting process, if the CSE allocates funding to the government relations department at the expense of the IT upgrade, will that decision maximize or diminish the overall value proposition to the members? Of course, the answer is, “It depends on the rationale.” However,





the question posed is a critical one for CSEs to consider in making decisions to allocate resources.

Successful CSEs build an aligned culture. CSEs need to understand the internal culture and strategize what it needs to become for optimal effectiveness in this time and place. Let's break this down in more detail.

The CSE recognizes the interdependent nature of what the organization does. He or she sees how all the parts have to be in good working order and in sync with each other to create the value proposition of the organization.

A successful CSE needs to exhibit advanced leadership skills. These skills go above and beyond the skill set of team-building, trust-building, and personal capacity-building. Advanced leadership breaks through traditional barriers of departments and going it alone. These advanced skills foster cross-functional teamwork and a culture of openness and continuous learning that results in

- Integrating organizational outcomes across all departments, which brings added-value to the membership
- Effective strategic positioning that creates global competitiveness and synergy through partnerships and alliances.

The CSE sets the tone for cross-functional teamwork: the leadership across teams. This is a difficult task because the CSE needs to bridge departmental turf to create an aligned culture that recognizes the interdependence inside the value proposition for members. Core to this culture is valuing diversity of viewpoints and perspectives. Better solutions are devised when different and relevant viewpoints are shared. Whether there is diversity of staff functions at the table or diversity of social experience, the synthesis of these shared perspectives will yield a much richer result.

When there is a shared vision for what creates value for members, positive energy will emerge that will move the organization forward. Savvy CSEs remember that people support what they help to create.

In this collaborative style of work environment, the CSE sets the tone for open communication in which feedback is sought, genuinely considered, and acted upon. This collaborative culture is much more effective than a competitive environment in which one department is intent on winning or dominating at a cost to others. To be effective in making the transition to this cultural style, the CSE has to inspire team leaders to be focused on outcomes for the members every step of the way.



Successful CSEs Master Systems Thinking

Successful CSEs apply high-level thinking to advance the association. This thinking, known as “systems thinking,” synthesizes these concepts into an aligned whole:

Focus on value to the beneficiaries, members, and stakeholders rather than the organization itself.

Recognize and embody interdependence rather than independence.

Focus on outcomes and bottom-line results rather than activity results.

Focus on convergent solution-seeking rather than linear problem solving.

Focus on the total organization rather than departmental silos.

Foster cross-functional teamwork rather than siloed solutions.

Foster a culture of openness and feedback rather than a closed environment to which outside influences can't get in.

Foster a culture of communication and collaboration rather than a “not my job” delineation.

Consider systemic changes rather than isolated change.

Adopt circular cycles to foster internal learning rather than linear processes.

Hold the whole organization as the primary concern so that you optimize the parts in order to maximize the whole.



Leadership to Successful Strategy

No CSE is successful without the leadership attribute. However, let's review here a few traits that set the best CSEs apart.

Communicating

Choosing the tone and frame of a message is one of the key elements of communication success. Watch any news program or read the newspaper and notice the tone and frame the spokespersons use to frame a situation so that others understand it.

The process for communication, however, starts with thinking through what you want to achieve. It begins with defining, “What is my desired outcome for this communication?” For example, is it the desired outcome to

alarm? To energize action? To inform? To create peace of mind? Once you decide, then consider appropriately framing and crafting the message.

When framing an issue, the CSE needs to think about how to position the issue so that the language chosen and the message crafted connect with the audience and the desired outcome is achieved.

For example, how would you frame a message for your board when a significant segment of membership has not renewed? You might frame the message in terms of comparative results, such as “As many organizations have experienced in this economic downturn, membership has decreased.” Or you might frame the message in terms of a crisis to solve, such as, “The drop in renewals is a clear indication that we need to evaluate our relevance to the membership.” Or you might frame the message in terms of long-term impact, such as, “If we continue to lose members at this rate, we will need to close our doors or merge.” You might frame the situation in terms of a commonly understood metaphor, such as, “We view this loss more like a spring pruning, when we can make room for new growth.” Which frame will achieve the desired outcome?

Successful CSEs layer tone in their communication as well. For example, if you have bad news to share, do you create a “just the facts” tone, a “remorseful” tone, a “panicked” tone, or a “serious crisis” tone? There are many options, but the bottom line is that the CSE’s communication must always take a professional tone. The choice of tone used will heavily influence the response of the receiver of the message.

The frame and tone you choose are critical to create the desired outcome of the message.

Delegating

To be a leader means there are followers. The job of the CSE is to create an environment in which people can be productive. To be productive, delegates have to see that they are contributing to the accomplishment of some goal or outcome. This usually requires giving initial guidance, tools, resources, and a degree of autonomy to do the job.

Delegating could be to volunteers, partners, or staff. Communicating about a project, including the rationale and the expected results, clearly allows for more effective delegation. Structuring what is needed, by when, and why can result in better productivity. Of course, appropriately matching talent to the project is part of the assignment as well. Fit your people to the job.



CSEs understand the importance of providing direction and then trusting but verifying that the work is being accomplished. They establish and check in on milestones, not specific tactics, with the delegates.

Managing Growth and Change

One of the best tools for managing growth and change is business planning with a keen eye on the flow of money, sources of revenue, and the feasibility and sustainability of revenue streams.

CSEs see how all the pieces fit together and what may need to be realigned for new direction and opportunities. Successful CSEs manage the processes that run through the association's departments, rather than the silos created by departmental boundaries. Examples of processes that run through departments include revenue generation, membership retention, and knowledge management.

Aligning with Mission

Shiny pennies. This is a term used to describe distractions that catch the eye of leaders and staff. A program may sound great and be sold as a revenue generator—but does it relate to what we do? Is it in alignment with our mission or our strategic plan? When a *shiny penny* does align, it is the CSE, and in larger organizations, the senior team, who sets the tone across departments to make sure the concept is properly vetted, planned, and implemented. As a manager, she or he assesses the impact and opens capacity, if appropriate, by eliminating activities that are no longer productive.

Successful CSEs assess and learn when to say yes and no. They do their homework with a focus on mission. They scan the environment and assess opportunities with clear criteria. They sense when to take risks and assess the level of risk that will be tolerated by the volunteer leaders.

Creating a Learning Organization

The CSE needs to set the tone and lead continuous learning for the industry or profession, the association's members, and the organization as an entity. What does this mean? It means that knowledge is freely and regularly shared and highly valued. It also means that insights of how this knowledge affects work processes, jobs, initiatives, and opportunities is shared. It is learning through each and every interaction and conversation. It is

seeking to understand rather than seeking to be understood. A successful CSE models how to listen to shared experience and draws out lessons to be learned, applied, and integrated into the way we think and do, and encourages others to follow in this path.

We live in a nonstop, changing environment. Association leadership not only guides their members through these changes but actively shapes the future and responds to changes that will better the industry or profession.

The CSE Sequence of Thinking

Successful CSEs play out a particular sequence of activities in seeking solutions as they come across problems, challenges, activities, and opportunities that present themselves in day-to-day activities. One such way of framing that sequence is *scan*, *plan*, *implement*, and *evaluate*, or SPIE.

This sequence is applicable to any situation, be it a major transformational change for the association, an accusation of wrongdoing at the staff level, or planning for a meeting.

A misconception is that an effective CSE will recognize a problem and quickly jump in and *do* something about it. This command-and-control approach is only effective if the CSE is dealing with a crisis when people and property are at risk, such as there is a fire in your building and evacuation is necessary. However, that “jumping in” impulse is not the best option in most situations. In fact, that *implementation* phase—the *doing something* phase—is really the third step in the desired sequence of action.

A successful CSE is *not* an impulsive player. For success, a CSE knows that one needs to have all the relevant facts to execute appropriate action (*a scan function*). “Knowing what I want out of this situation before I jump in” is the *plan* function.

All four of these steps are process oriented, offering a particular thinking sequence that will lead one to or toward the desired result.

Let’s look at each of these steps in the sequence.

Scan

The process of scanning is all about intelligence gathering at whatever level is relevant to the situation. Scanning could include assessing how you feel about an issue, gathering facts about an interpersonal conflict situation, scanning past events to assess where you are today, observing



the interactions between managers and their subordinates, conducting a survey with relevant players to understand how they think about an issue or what they need in a solution, environmental scanning to understand the influences at play, and even future environmental scanning to anticipate how change drivers will affect the association and its members.

A successful CSE will scan for the relevant intelligence, including facts, contributing factors, motivations, and pertinent relationships, to fully understand the issue before planning a response.

Plan

Any planning process implies that you wish to make some change in the environment. Identifying the change—beginning with the end in mind—creates an efficiency in the planning, allowing the planner to identify the key steps in reaching the desired goal. Consequently, the first step in any plan of action is to answer the question, “What is the desired outcome?”

It would be important to note that you may desire multiple outcomes. For example, what is the outcome you want to achieve at the end of the process? What is the outcome you want to achieve among the players in the process? What is the outcome you want to achieve as you personally engage in the process? Identifying the outcomes for all the various levels involved will point to certain ways to plan your implementation process.

For example, you have an interpersonal staff conflict that you must address because it is impeding progress of your senior management team. What is the desired outcome you wish for your intervention? *Resolution of the conflict.* What is the desired outcome you wish for the players involved? *Mutual respect, valuing differences, and shared resolution to the situation.* What is the desired outcome you wish for you in the intervention? *Become less reluctant to deal with tough interpersonal issues, better understand the interpersonal dynamics of strong personalities.*

The planning should consider the process to be used, who should be involved, and how you might frame the messaging, all focused to achieve the desired outcome. You may want to pre-think likely objections to your actions and be ready for appropriate responses that will override the objections presented.

The *process* to be used is a critical component of planning. The politics of who gets invited first or who sits next to whom in a high-level meeting at the head table is the stuff that creates hard feelings and political faux

pas. For a CSE, designing and sequencing the process is a critical task for effectiveness and success in achieving the desired outcomes.

Implement

Executing your plan is the focus of implementation, rather than impulsively “jumping into the fire” and making things happen. Implementation requires focus on the end prize—your desired outcomes. Effective execution of your plan requires that your actions track with your plan. Of course, there are times when you need to make modifications, particularly when you run into unplanned responses. However, tracking your actions with your plan will likely get you a better overall result versus “shooting from the hip” in the moment.

Evaluate

Evaluation is a space that we tend to forget as a key to process improvement. Evaluation can take place during the process (formative process evaluation) and after the process (summative evaluation).

In formative process evaluation, you continually evaluate your every move and assess whether it advances the likelihood of achieving your desired outcomes. If the planned moves are not leading in the right direction, you have to modify your plan.

In summative evaluation, you debrief on the process used, identify the lessons learned in the experience, and ultimately integrate those lessons into your future activities. This activity is critical to being a learning organization.

The Future

If you are the CSE of an organization or hope to be one in the future, take to heart the importance of continually learning to master the profession of association management. Learn how to stay connected to your leadership, staff, and partners to build trust and avoid surprises.

Be intentional and strategic in your knowledge, relationships, and perspectives. Learn from every interaction. Observe and listen. Align your decisions to be consistent, since this is what sets the culture and brand of the organization and influences the profession as a whole.

The Authors

Cheryl O. Ronk, CMP, FASAE, CAE, is the chief staff executive of the Michigan Society of Association Executives (MSAE).

Susan S. Radwan, SMP, ARM, CAE, is the owner of Leading Edge Mentoring, an international consulting firm based in Grand Ledge, Michigan. Since 1996, Ronk and Radwan have partnered to teach the MSAE-sponsored CAE online exam preparation program, supporting CAE candidate learning around the world.