

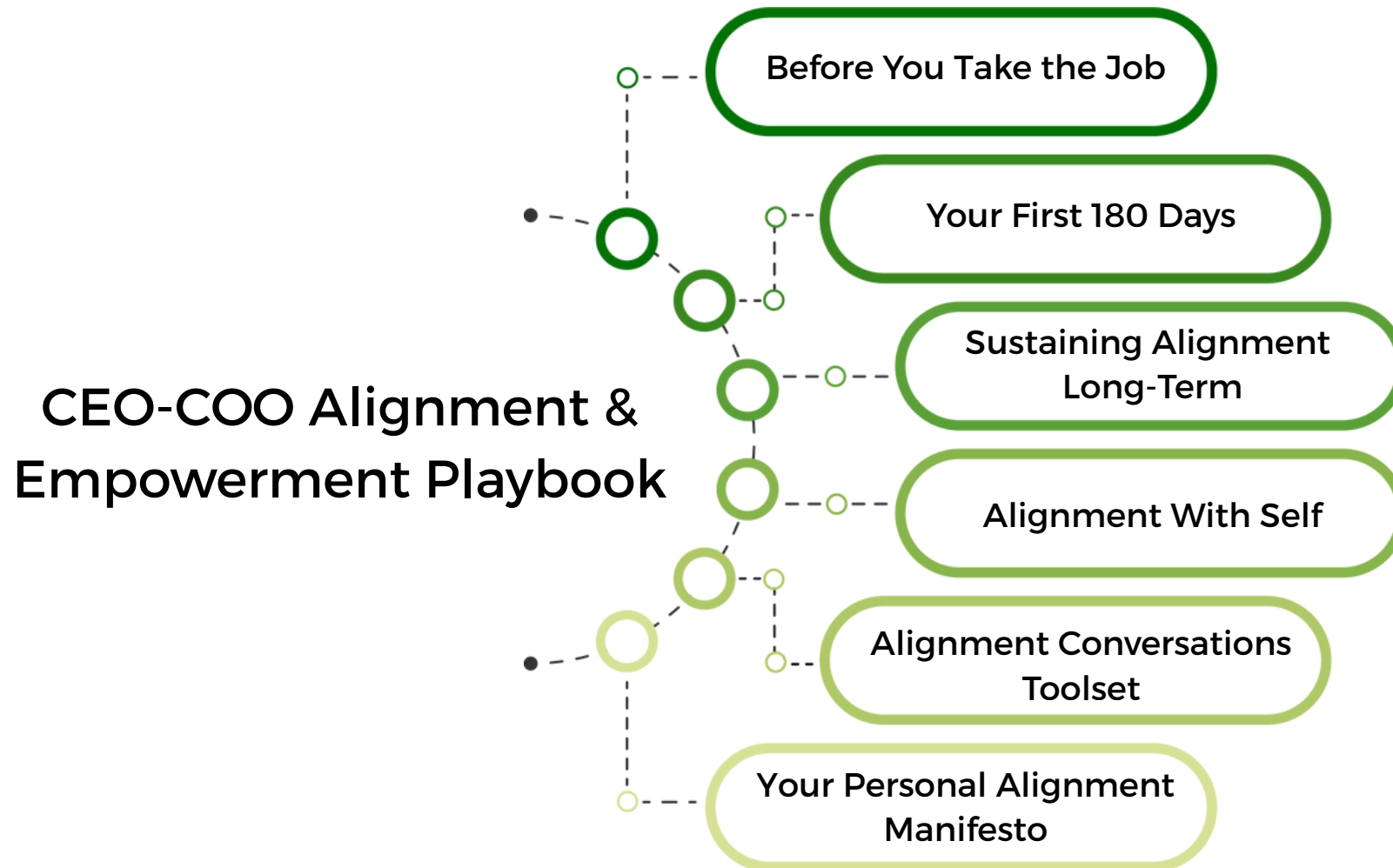
CEO - COO Alignment & Empowerment Playbook



**A Practical Guide for Building, Protecting,
and Sustaining CEO/COO Alignment**

Overview:

Here's what we'll cover in this playbook:



Section 1: Before you take the job

Interviewing for Alignment, Not Just Employment

1.1 Why this COO role exists - uncover the “origin story” of the role.

Questions to ask the CEO:

- Why are you hiring a COO now?
- What problems are you expecting this role to solve in the next 12-24 months?
- What does success in this role look like in the first year?

Questions to ask yourself:

- What parts of this align with my strengths?
 - Where might there be misalignment?
- If hired, would you be the first ever COO for the company?
- Yes? This new power-sharing dynamic/relationship between a CEO and COO may present special challenges. Often, CEOs may not be as prepared for this relationship as they might think.

Ask the CEO the following question:

- What do think will be the most challenging part of working with a COO for the first time?

Section 1: Before you take the job

Interviewing for Alignment, Not Just Employment

1.2 Understanding the Role based on Scope, Authority & Decision Rights

Questions to ask the CEO:

- What do I fully own?
- In what areas do we share ownership?
- Where do I advise but not decide?
- How do we resolve disagreements?

Questions to ask yourself:

- What parts of this align with my strengths?
- Where might there be misalignment?

► Want to go deeper into preparing for the interview?

Take the COO Survey for the CEO-COO Alignment Index™. This survey will prepare you to ask the right questions, help you understand what's important to you as a COO and identify the potential misalignment areas with the hiring CEO.

Take the survey here: <https://zfrmz.com/cwgbT5Dz36EGgltAsJM8>

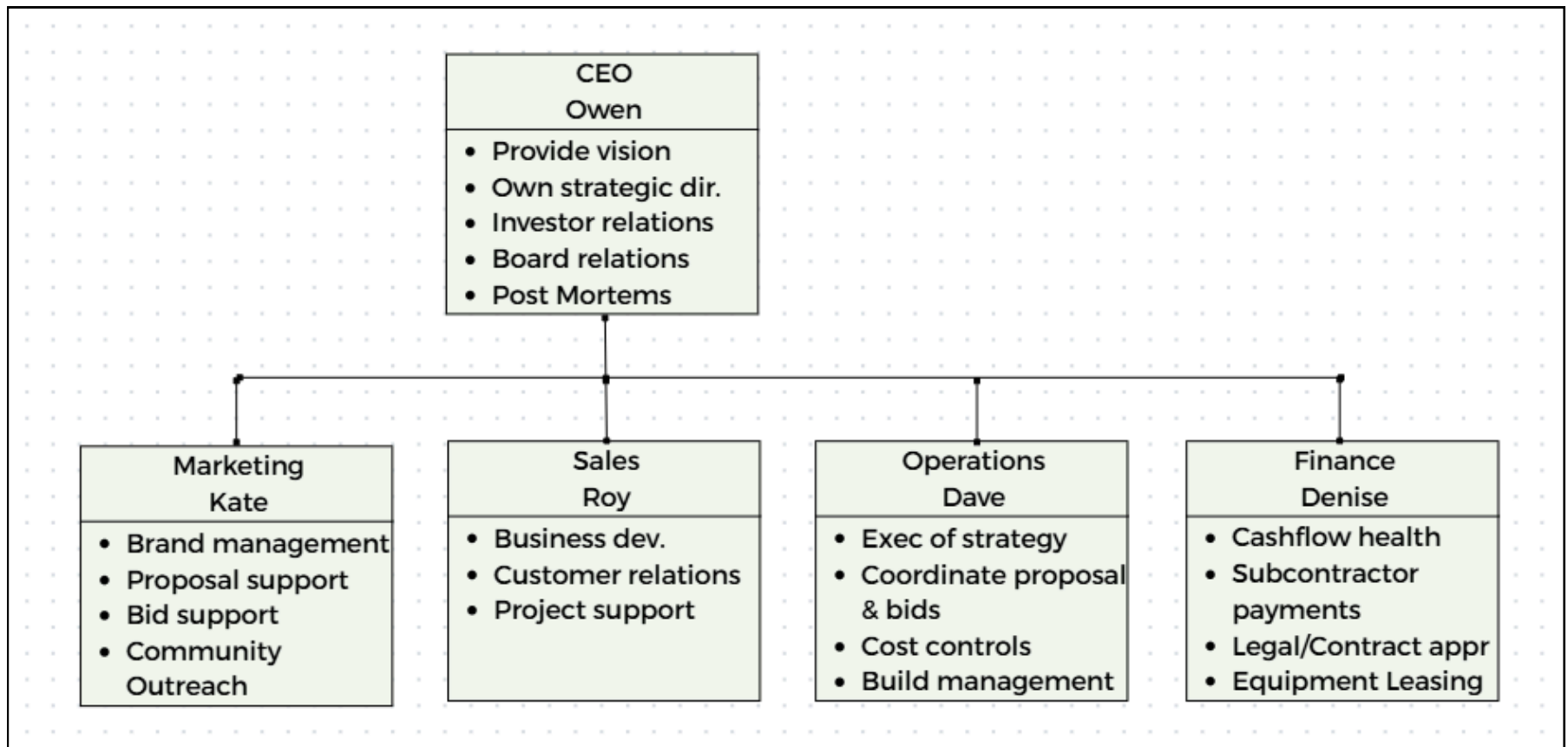
Section 2: Your First 180 Days

Building Alignment Through Communication, Clarity & Boundaries

2.1 Defining Your Scope, Authority & Decision Rights

Along with the CEO, create an Accountability Chart (by function)

Example:



Section 2: Your First 180 Days

Building Alignment Through Communication, Clarity & Boundaries

2.1 Defining Your Scope, Authority & Decision Rights

Accountability Chart continued:

Accountability Charts are a great tool for capturing clear accountability throughout the organization, not just between CEO and COO. It helps everyone understand who owns each functional area of the business. Often, the CEO takes on the Visionary role and the COO takes on the Integrator role. Both of these terms are used by EOS® (Entrepreneurial Operating System) to better define how the CEO and COO function as a team. The Visionary is responsible for identifying the vision or strategic direction of the company while the Integrator is responsible for executing that vision.

See more on EOS and the Accountability Chart here:

► <https://www.eosworldwide.com/what-is-eos>

Section 2: Your First 180 Days

Building Alignment Through Communication, Clarity & Boundaries

2.2 Defining Your Scope, Authority & Decision Rights

RACI Chart

A RACI Chart is a great tool to help the organization clearly define authority and decision rights across key functions.

R = Responsible: defines who does the work

A = Accountable: defines who owns the results and must sign off on key decisions

C = Consulted: defines who provides input into decision making

I = Informed: defines who is informed or “kept in the loop” about decisions

Building a RACI Chart will also identify key communication channels needed to keep different people in the organization consulted and informed. Remember to include functions that are subcontracted and/or run remotely.

The RACI Chart should first highlight the major functions in an organization at a high level and can then be developed at increasingly more detailed levels. RACI Charts can also be linked to show multiple levels of accountability and decision rights.

Section 2: Your First 180 Days

Building Alignment Through Communication, Clarity & Boundaries

2.2 Defining Your Scope, Authority & Decision Rights

RACI Chart

Example:

Tasks	CEO	COO	CFO	CMO	VP Sales	Cust S. Dir
Product Delivery	I	A	I	I	C	I
Contract Development	I	C	I	C	A	R
Contract Approval	C	I	A	C	R	C
Vendor Approval	I	A	R	I	I	I

Section 2: Your First 180 Days

Building Alignment Through Communication, Clarity & Boundaries

2.2 Defining Your Communication Plan

Communication Needs Matrix

This chart is used to identify key communication needs within an organization. It identifies:

Who = The person responsible for the communication

Recipient = The person who receives the communication

Subject = Title or content of the communication

Method = Type of communication (email, 1:1 meeting, phone call, other)

Frequency = Tigger or cadence of the communication

The Communication Needs Matrix can also be used to identify key organizational reports that are distributed on a regular basis. If you have significant communications requirements with outside agencies, contractors, suppliers, customers or others, list them here as well. The goal here is to prevent communication breakdowns that lead to friction and eventually misalignment.

Section 2: Your First 180 Days

Building Alignment Through Communication, Clarity & Boundaries

2.2 Defining Your Communication Plan

Communication Needs Matrix

Example:

WHO	Recipient	SUBJECT	METHOD	FREQUENCY
COO	CEO	Production Down	email	when required
COO	CEO, Sales Director	Missed Shipment for VIP Customer	1:1 meeting	Before miss or ASAP
CFO	COO	Supplier on Credit Hold	Email	prior to hold
CEO	COO	Organizational Changes	1:1 meeting	when required
COO	CFO, CEO	Labor Budget Projections	email	weekly

Section 2: Your First 180 Days

Building Alignment Through Communication, Clarity & Boundaries

2.3 Setting up the 1:1 Alignment Meeting

Checking alignment with the CEO on a regular basis is a powerful tool to maintain your effectiveness. This regular meeting gives you both the opportunity to identify gaps to close as well as to identify what's working.

The 1:1 Alignment Meeting should include the following framework:

- **Priorities:** Review the key metrics you own
- **Risks:** Specify challenges that need advanced discussion to prevent backslide
- **Consultations:** Identify decisions requiring CEO input prior to decision-making
- **Support:** Define areas for which CEO support is needed
- **Wins:** Share wins and discuss what's working
- **Alignment Rating:** Discuss how well you both feel about your current alignment

Cadence: set a schedule for your 1:1 Alignment Meetings at a more frequent rate, even weekly at the start. The meeting cadence will most likely extend across a longer time period as you establish trust and a strong working relationship.

Lock these dates down and resist the urge to skip the meetings if things seem to be going well.

Section 2: Your First 180 Days

Building Alignment Through Communication, Clarity & Boundaries

2.4 Develop your Leadership Avatar

This defines how you show up as COO. Consider it your personal operating manual.

Write down the following:

1. How do I operate under pressure?
2. What energizes me? What drains me?
3. What are my firm boundaries? Boundaries are how you expect to be treated as an executive and the limits placed on them.
4. How do I best receive feedback from the CEO?
5. What creates resentment for me?
6. What behaviors build trust with me?

By better understanding how you operate emotionally, you can convey this to the CEO. This gives the CEO a guide to how you want to be treated as a leader.

► Did you feel resentment, or like you were unheard or overlooked between your 1:1 Alignment Meetings? Bring these signals up at your next meeting. Openly share and discuss them. By doing so, you will maintain your own personal boundaries and expectations.

Section 3: Sustaining Alignment Long-Term

Recalibration, Reinvention, and Long Horizon Conversations

3.1 Annual Charter Renewal

This is the annual opportunity to review your alignment with the CEO. Think of it as a relationship health check-up.

Areas to explore and discuss with your CEO:

- What's changed in the business?
- Which of my domains have expanded or contracted?
- Which accountabilities and responsibilities need to be renegotiated?
- Where did I become a bottleneck in the business?
- Where did the CEO become a bottleneck in the business?
- Have our 1:1 Alignment Meetings become transactional or are they still adding value?
- Is the CEO bypassing you on decisions that you were a part of in the past?
- Has there been any drift in your alignment?

Section 3: Sustaining Alignment Long-Term

Recalibration, Reinvention, and Long Horizon Conversations

3.2 Empowerment Check-In

Empowerment isn't a one-time achievement, it's a recurring audit.

Questions to ask yourself:

- Am I still working from strength or from exhaustion?
- Have I slipped into saying “yes” too often?
- Am I still setting boundaries I can sustain?
- Have I started to feel like I am taking one for the team?

3.3 Future Alignment Conversation Plan

Every COO eventually faces the question: What's next?

Questions to discuss with the CEO:

- How do I want my role to evolve or is succession on the table?
- What does the CEO envision for my future?
- What skills do I need to build for the next chapter?

Section 4: Alignment With Self

Because the COO Role Erodes Those Who Neglect Their Inner Foundation

4.1 Personal Alignment Questions

Ask yourself monthly:

- Am I proud of how I'm showing up?
- Am I still leading with clarity instead of caution?
- Am I avoiding difficult conversations?
- Am I sacrificing myself to "keep things running"?
- What do I need that I am not advocating for?

4.2 Stress Load Map

Identify where stress is coming from.

Ask yourself monthly:

- What keeps me up at night?
- What is purely operational?
- What is relational?
- What is self-inflicted?

Section 4: Alignment With Self

Because the COO Role Erodes Those Who Neglect Their Inner Foundation

4.3 Renewal Rituals

Develop practices that keep you grounded and prevent burnout.

Ideas:

- Scheduled quiet thinking time
- Journaling
- Reflection days
- Setting boundaries around work hours

Write down your renewal commitments.

Section 5: Alignment Conversations Toolset

Scripts and Language COOs can use to stay aligned without being abrasive

5.1 Reframing Conversations

Utilize these conversation scripts:

- “I want to check our alignment before we scale this decision.”
- “Here’s what I am seeing and why it matters.”
- “I need clarity on ownership so we can move faster.”
- “When expectations shift without conversation, it slows execution. Can we reset?”
- “How does this look like winning to you?”

Write down your own versions:

5.2 Addressing Drift Directly

Utilize these conversation scripts:

- “I’m sensing some drift between us. Can we unpack what’s changed?”
- “I want to recalibrate so we don’t get misaligned over time.”
- “I’m noticing decisions happening outside our normal rhythm, is something shifting?”

Write down your own versions:

Section 5: Alignment Conversations Toolset

Scripts and Language COOs can use to stay aligned without being abrasive

5.3 Bringing Up Boundaries Without Apology

Utilize these conversation scripts:

- “I can take this on, but we need to pause or reassign X.”
- “I’m at capacity. What should come off the plate?”
- “I want to give this my best, which means we need to prioritize.”

Write down your own versions:

Section 6: Your Personal Alignment Manifesto

A One-Page Commitment To How You Will Lead As COO

Use this section to define your philosophy, your commitments, and how you intend to sustain alignment over years of service.

Prompts for writing:

- What kind of COO do I want to be remembered as?
- What values anchor my leadership?
- What boundaries are essential for my mental and emotional longevity?
- How will I show up in the toughest moments?
- How will I protect alignment with the CEO and myself?

Write down your own manifesto:

Final Note

This playbook isn't just a companion to the article - it's a tool for COO longevity. A COO's power doesn't come from operational skill alone. It comes from clarity, alignment, boundaries, communication, and the courage to continually renew the partnership at the core of the role.