

Workflex and Managers Guide

*Setting You and Your Team Up
for Success*



by KENNETH MATOS
and
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WHEN
WORK
WORKS



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Section I: Introduction

If you're feeling overworked, you're not alone. Almost 9 in 10 (88%) managers in the U.S. say that they have to work very hard and, on average, work more hours per week (46 hours) than non-managers (40 hours).¹ Finding the time to care for yourself and your family while sustaining the engagement, productivity and innovation of your team is the challenge facing today's managers. For too many managers, this challenge feels like having to make everything work for everyone except themselves. However, the key to a successful workflex strategy is making sure you have work-life fit first and then helping your team members find their own.

The workplace has been radically transformed in the 21st century by many new norms like the:

- anywhere/anytime nature of work, due to advanced communications technology;
- pressure to do more with less, due to tightening operating margins;
- globalization of both your markets and your workforce; and
- demands of caregiving, which can often be unpredictable.

All this means the need for effective and flexible workplaces is greater than ever, not just for employees, but also for the managers who must deliver results both for the business and for the teams that do the work. Many managers feel caught between these two forces and don't know how to bridge the immediate need to get things done and the long-term goal of sustaining an engaged and productive workforce. Yet, this is exactly the task that senior leaders have charged many a manager to accomplish without providing a clear method or supportive culture to produce those seemingly contradictory results.

There is no master plan for the effective workplace, but there are blueprints for how you can go about identifying your best workflex scenario where you, your family, your team and your business all benefit. This Guide provides a quick and practical overview of the key steps managers must take in order to create a more effective and flexible workplace for everyone.

If you follow the tips laid out in this Guide, you should end up with a plan for creating a more effective and flexible workplace for yourself and your team. You'll get practical advice on how to foster a flexible mindset, how to identify the workflex options that will promote success for you and your team and how to make sure you support one another on this journey.

Though much of this Guide is written to provide you — the manager — with more workflex, the same basic rules and processes apply for employees, so they can also be used as a tip sheet for walking an employee through the process of creating a workflex plan that works for everyone.

Additional information on managing specific workflex options, like telework or providing workflex in unusual industries like manufacturing or health care, is available for free download at [WhenWorkWorks.org](https://www.whenworkworks.org).

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Section II: What Is Workflex?

Conceptually, workplace flexibility or workflex is the same for any employee on any team in any industry. It's a dynamic partnership between employers and employees that defines how, when and where work gets done in ways that work for all (employers, employees, managers, families, clients and communities). Workflex is not a reward or perk to be doled out to just those employees who have proven that they do not need it to be successful. Instead, workflex is an opportunity to help all employees (including managers) be more successful on and off the job. The results of this process can look very different between industries, organizations and even among specific teams in the same organization.

For workflex to be maximally effective, it must respond to the unique combination of organizational culture, jobs, work processes and employees present in a specific team. This means that no two teams are totally alike and best practices in one may not make sense in another. Similarly, specific policies like telework or shift scheduling may or may not work equally well for all teams and employees. Even when two teams have the same programs, they may bear little resemblance to one another — even if they achieve the same great results for each.

At its core, workflex is a process for getting work done that increases effectiveness and efficiency on and off the job.

As a manager and leader, you are primarily responsible for two things related to workflex: 1) facilitating a collaborative process where all stakeholders can fully participate in the search for the best workflex solutions for all involved; and 2) managing the ultimate policy or solution decided upon. These are daunting responsibilities for many managers, especially in light of the need to avoid any signs of favoritism or discrimination in how workflex is managed. Other managers find that workflex becomes something that they give to employees, but never find a way to benefit from themselves — despite needing it just as much.

Though workflex is focused on creating greater fit between people's lives on and off the job, the skills that lead to effective workflex are applicable in a wide range of managerial roles and responsibilities. The manager who can solve a tricky workflex problem will be practicing the same strategic leadership skills needed to coordinate a board, manage resources, and consider the breadth of priorities that go towards the success of the organization and its stakeholders.

I feel very strongly about just getting the work done on time, no matter where or how it gets done. I champion this with my team. I have a young family and need this flexibility, so I try to lead by example and offer my team the same flexibility options. I set expectations and then give them the responsibility to execute on their own. Good employees will work hard and remain loyal if you let them have their life. Bad employees will fail whether you give this flexibility or not.

- Manager at Hulu - Santa Monica, CA

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Section III: How Does Workflex Benefit Me Personally and Professionally?

Workflex is a powerful tool in today's workplace, one which is in high demand. Many industries and professions — from [health care](#) to [manufacturing](#) to [congressional staffers](#) — are having important conversations of how to provide more workflex for their teams. This broad desire for workflex is not surprising given that workflex helps with:

- **More time for your family and yourself.** According to Families and Work Institute's 2016 National Study of the Changing Workforce,² more managers who have high personal flexibility than managers with low personal flexibility report they have enough time with their children (49% vs. 18%), their spouse/partner (47% vs. 30%) and themselves (47% vs. 27%). When you use workflex to support your team (and that includes you), you are more likely to find you have enough time to be with your family and not just with your coworkers and clients/customers.
- **Keeping you and your team healthy and alert.**³ Employees who report higher work-life fit also report:
 - ✓ less frequent minor health problems
 - ✓ better overall health
 - ✓ fewer signs of depression
 - ✓ less frequent sleep problems
 - ✓ lower stress levels
 - ✓ positive impact of their job on their energy level at home

Healthier employees are more likely to show up for work and take fewer sick and personal stress management days, thereby reducing interruptions or delays in your work flow.

- **Keeping you and your team engaged and productive.** Employees who report higher work-life fit (38%) describe being highly engaged at work compared with those with low flexibility (12%), meaning that they are willing to go "above and beyond" to contribute to their maximum potential.⁴ Employees appreciate the trust you place in them to get their job done and the recognition of their lives outside of work when you manage flexibly, and they express that gratitude by performing at their best. In one study of teleworkers, productivity increased [up to 22%](#)⁵ due to fewer distractions and needing fewer sick days.

CASE IN POINT:

Sue Ann came back to work at a small staffing company in Ohio full time after her second child was born, but she quickly realized that something had to give. So, she went to the two owners of the business and said, "I need to quit." They said, "Before you do that, let's talk through this and test out a part-time model." Sue Ann proposed working three 10-hour days per week so she could have Mondays and Fridays off. The owners weren't sure it would work, but they took the risk. Three months later, Sue Ann was hitting her sales targets; two years later, she came back full time and was promoted. Now, Sue Ann runs the company as CEO and is still using workflex as a retention and engagement tool.

- **Keeping your team — and reducing turnover.** Flexibility is a key driver of retention and, conversely, lack of flexibility can double the percentage of people considering looking for a new job (e.g., 31% of those with low flexibility are “very likely looking for a new job in the next year” compared with 16% with high flexibility).⁶ Turnover is costly to any team even if your finance department isn’t hitting your budget directly with these costs. The rule of thumb is that replacing someone who left voluntarily costs 150% of that person’s salary, which takes into account the time and effort it takes to recruit a replacement, and the time it takes to bring the new person up to speed and to develop new internal and external relationships. As a manager, you are personally paying these costs through the extra strain on you and your remaining team members.

Section IV: Getting Into a Workflex Frame of Mind

Managers in the crush of the workday can find themselves focusing on getting the work done above all other considerations and resist workflex because they see it as just another burden on their time and attention. Managers that choose to be inflexible rather than take the time to rethink how work gets done often find that getting it all done gets a bit harder every day. This is because not attending to employee sustainability leads to burnout and turnover. New employees need to be trained before they perform at their best, drawing on even more of your precious time. Work backs up and you push people even harder — leading to more burnout and turnover — and you have even less time for yourself. The only way out of this cycle is to choose to manage differently.

To make the shift, look for signs that you are going into an inflexible state of mind when making a decision around how, when or where work will get done.

Are you feeling frustrated, angry, or worried? If so, you are more likely to make a quick decision to make those feelings go away and not consider all your options for getting the work done and taking care of yourself and/or your team at the same time. When you have those moments, avoid making any decisions until you feel calmer and have a moment to consider all your options. It's okay to say that you need to consider a situation and will get back to a leader or employee with an answer after a specific amount of time, maybe after lunch or first thing tomorrow morning.

When you are alone remind yourself of four strategic priorities for effective workflex:

1. **Work is a marathon, not a sprint.** There is always more work, it is never “done.” Burning out an employee to finish a task today just means you will be short-handed tomorrow. Reexamine deadlines and consider whether they are realistic. If you push yourself or your team, will the work really get done well? Are the deadlines tied to an actual outcome that really matters or are they arbitrary? Who is affected by a changed deadline and to what extent?
2. **Team not individual.** People often think of workflex as an individual thing e.g., Sofia's telework, Nassim's alternative schedule, Chris' compressed work week. In reality, workflex is a collective endeavor where employees can help one another achieve their goals on and off the job. Is there a way to trade duties so that all employees have fair amounts of work that fit better into their goals? Can trading shifts, tasks or accounts give everyone more flexibility?




Check out our guide on telecommuting by visiting [WhenWorkWorks.org](https://www.whenworkworks.org).

3. **Boundaries work in both directions.** As a manager, you will need to tell employees no on occasion, but you should also be willing to speak on their behalf to leaders when demands become unsustainable. Is this a situation where you can question orders effectively? Can you help a leader reconsider a decision to protect your team's long-term productivity? You may not be able to refuse an order, but you may be able to persuade your leaders to change or even just adjust their directives. Just raising an issue — even if nothing changes today — may change the way your leaders plan in the future.
4. **Best possible, not the ideal.** Sometimes there is no perfect win-win situation where everyone gets what they want. There are often constraints that can't be avoided. If an employee needs to be physically present to do a job, then they can't telework. It's alright to say no. However, is there something else that might be better than a simple no? Would a schedule change work where telework was impossible? The goal of workflex isn't to create the ideal scenario, but the best one possible given the circumstances.

Section V: Identify the Workflex That Works Best for You

Workflex works best when managers and other leaders are engaged with making a good fit between their lives on and off the job. Not everyone wants the same mix of work and home life and not everyone has the same demands and priorities. Don't just follow your senior leaders' example. Instead, actually consider what it is you want for yourself and strategize how you will get as close to that ideal state as you can given the circumstances you can and cannot change. Even if you feel that you already have sufficient workflex, going through this process will help you walk your team through the same process and make sure that, as you provide them more workflex, you don't lose any of the workflex that helps you achieve your goals.

- 1. Identify the personal and professional goals that are important to you.** Are you looking for a promotion in the next year, to learn new skills to get a plum assignment or meet the CEO at that conference next fall? Is it important to you to attend all of your kids' ballgames and have dinner at home every Monday? Knowing what you want to achieve will make it easier for you to prioritize and create plans that integrate your goals rather than trading one for another. Making a list will help with the next steps.
- 2. Share your goals with your family, supervisor and team, and ask how those goals affect them.** Understanding what others want and expect from you will help you see which goals are important to you and the people in your life and which ones are just extra pressure from false assumptions. For example, you may feel you need to fight to attend the opening night of your friend or child's performance when all they want is for you to go to one show before the end of the run. You may give up the entire weekend finishing a report for your boss when all she wanted was a few essential numbers by Monday. Make sure to take note of what is most important to your stakeholders, so you can focus on what actually matters.
- 3. Prioritize your goals.** First, remove goals that neither you nor your stakeholders care about from your list. Second, adjust overinflated goals to match the real expectations. Third, rank your goals in terms of what you most want to achieve first and which ones can be worked on together. Focus on goals that matter and have meaningful results, not just those that have the closest deadlines.
- 4. Decide what is not negotiable.** For some, it will be attending religious observances, a child's activities, making time for the gym, going to a conference or attending a class. Once you have identified these key goals, you can build schedules around them so that you always get what matters most to you while still fulfilling your responsibilities. Make sure others know early what times are "no-go" zones for you, so they don't casually ask



Check out our [Workflex Primer](#) for an overview of the categories of flexibility.

for those time slots. If someone does ask for those time slots, remind them first that this a time that you try to protect and ask if what they need really needs to be done at that time. Ask about how, when and where a request needs to get done to try to find alternatives.

5. **What forms of workflex will best achieve your goals?** Once you know what you want, you can consider ways to achieve those goals. Do you really need to work from home all week or would one day suffice? Is a compressed workweek better than an alternative schedule? What do your best options for how, when and where you work look like for you?

Section VI: Implementing Your New Workflex Plan

If you need to seek approval from your manager for the workflex that you want, you should check out the [Workflex Employee Toolkit](#) for tips on how to go about that process. If you have the authority to pursue the workflex that you see fit for yourself and your team, there are still some things you need to keep in mind while bring your own workflex plan online.

- 1. Managing reputation.** Not everyone understands the importance of workflex and the fact that those working flexibly still have to contribute the same value regardless of how, when and where they work. Don't hide your workflex and let others make assumptions about you. This means that you will need to make the effort to describe your successes and challenges to your peers and leaders, so they can see the quality of your work alongside your workflex. Plan when you will provide essential updates and meetings with key decision makers. Be direct and explicit about your career ambitions, so there is no question about how far you wish to go in the organization.
- 2. Coordinating with others.** Perhaps the most important part of managing your reputation is coordinating with others. Workflex is a team sport, and everyone needs to know the rules of the game. Make sure everyone who relies on your work knows your schedule and how to contact you. If you will be unavailable at times, give them a clear backup person to call who you keep up to date on the work of you and your team.
- 3. Get a good back-up person.** As a manager, your perspective is often a unique contribution to your team. That makes it harder to step away from work and feel like you won't be needed in an emergency. Develop a solid back-up person to cover your role while you are away. This could be another team member who you keep up to date on business goals and politics, so they can make wise decisions in your absence. Alternatively, you could partner with a peer to be the go to person for each other's teams when one of you isn't around.
- 4. Delegation and responsibility.** Good delegation is essential for making sure you don't take on too much whether you're present or while a back-up person fills in when you are gone. You and your team should understand who can substitute for who and when. Consider whether tasks that you usually do should be given to other team members, so they can develop and you can have more time to do what's really important for your role. For example, someone else could assemble the shift schedule — which you approve — and you can focus on strategies for improving sales or performance. Though training others does have some

Another useful resource for thinking about the best workflex options for you and how to go about pursuing them is the free [Workflex Employee Toolkit](#).



start-up costs, a cross-trained team will function well in emergencies and staff shortages, giving you more flexibility and time when you need it most.

5. **Managing emergencies.** Managers are often checking their email on their off-hours in case there is an emergency. When they do, they often respond to non-emergency things that cross their path sending signals to employees that there aren't really any off hours and that even small things can't wait till the next business day. Instead, implement a phone or text message policy for emergencies with your team and clients. Both of those options actively signal the team member that their attention is needed rather than relying on them constantly giving over some attention to check if there is a problem. This will give you and your team more confidence that, if their phones aren't ringing, everything is okay. The real time interaction of a phone call will confirm that your message has been received and someone is acting on it. If you don't feel like the situation is worth calling for, reconsider whether it is really an emergency.

Section VII: Integrate the Team's Plans to Support One Another

Once you have brought your workflex plan online, you will need to integrate it with your team's workflex plans. This means making sure everyone is communicating effectively about what they are doing, and confirming that there are no contradictory schedules, expectations or unfulfilled responsibilities.

The following steps will help you get everyone's plans in alignment.

1. **Share this Guide.** Disseminate this Guide and other information on workflex with your team, so they can use the same process to set up their own plans and understand your perspectives on workflex.
2. **Communicate goals.** Your team will be able to better support one another if they know each other's goals and the workflex it takes for each of them to achieve those goals. If privacy is an issue, it is okay to just talk about the time you need, if not the specific reason.
3. **Establish collective responsibility for meeting everyone's goals.** Workflex works best when everyone is committed to helping each other, not just achieving their own best fit. When someone has to give up a workflex goal, it is the team's responsibility to debrief and figure out how to stop it from happening again.
4. **Establish a forum for updates.** The most common option is to discuss schedules and goals (both personal and professional) during team meetings. While this may seem odd, studies have shown that this kind of sharing enhances planning and outcomes, both for the team and the clients/customers.⁷ Workflex planning and updates help create better schedules and collaboration, resulting in better client/customer service. It can be as simple as asking at the beginning of the meeting whether anyone has or anticipates anything that might change their own or another team member's schedule. Team calendars (with the non-negotiable events listed) will help everyone keep track of all the team's priorities: personal and professional. Make sure to uplift the quality of your meetings by including both what must be done and why it is important, so people can better prioritize and take each other's goals into account.
5. **Role model the conversation.** The easiest way to show people what needs to be discussed is to share your own thought process. Provide the information that they need to know to understand and support your schedule first. Then ask them if they have similar considerations they would like the team to take into account when making plans. It may take a few tries, but, eventually, they will see how you are getting more flexibility and offering them the chance to share in the new options.
6. **Cross-training checklist.** Go through everyone's jobs and identify the most critical tasks that need to be done if someone is suddenly unavailable or is gone for an extended period. Make sure one or two other people are prepared to take over, so that everyone has someone to cover for them effectively. If training is needed, schedule that training and practice the tasks before there is a workflex event, so that everyone is comfortable that the transitions will be seamless. In addition, set up a coverage plan, so people don't have to negotiate at the 11th hour which cross-trained person will cover for them.

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Section VIII: Managing Performance with Workflex

There are two types of performance you will want to manage while leading a team with workflex. First is the work itself which must remain high quality. Second is the workflex process and culture, so that it enhances the work and people's outcomes and doesn't get worn away by day to day stress.

1. **Metrics of work success.** There should be clear measures of whether an employee is being successful both in the job and in making workflex work. Physical presence at the worksite is the most minimal form of performance and really provides little real indication of performance. If you

don't have a clear job description with deliverables, making one is the first task. Check in with employees — especially teleworking employees — on a regular basis. Determine if they are making appropriate progress towards their goals. If not, why? Is it a communication, time management, performance or resource issue you can help them resolve? Consider a gentle reminder that their deadlines don't change with flex, and they should plan on delivering quality work on schedule. All employees — regardless of how, where or when they work — are subject to the same corrective actions for failing to meet their agreed upon goals. If your organization doesn't have a performance improvement process, then developing one would be the next step, so all managers are applying the same processes across employees.

Also, make sure to document performance issues that arise, so employees are not caught off guard down the road if disciplinary action becomes necessary.

2. **Metrics of flex success.** Once you have work metrics, add a separate sheet listing the employee's workflex outcomes. Are they getting their compressed day off? Are they getting to have dinner with their family? Did they get to go to the conference they planned on? If not, reexamine the workflex to see if and why work might be overflowing the bounds of the workflex plan and make changes. In addition, implement a time recording system or program and require that employees record all hours worked. Use this information to manage both overwork and overtime. This effort will go a long way not only to preventing burnout, but also to ensuring you are meeting all applicable wage and hour requirements.



3. **No cannibalizing the success.** One common mistake of workflex is to see the time reclaimed through flexibility as an extension of workable hours. For example, a teleworker is seen as having a ten-hour day because he/she no longer has to spend two hours commuting. Don't increase workloads just because someone works flexibly. You should have a consistent expectation of how much work a position should accomplish regardless of how flexible the work conditions.
4. **Communicate expectations.** Make sure the employee knows exactly what is expected of them and that workflex changes how, when and where they work. It does not change the level of performance expected of them. Let them know how you plan to stay in touch with them and what kind of updates you are expected to provide one another during those check-ins.
5. **Accountability.** Culture change requires that people be held accountable for acting in ways that are consistent with the new objectives. In the case of a culture of flexibility, you will want to reinforce people's sense that they must fulfill the responsibilities that make workflex work. For example, if a meeting is scheduled at an inconvenient time because someone didn't keep their calendar updated, that person is responsible for finding a new time that works for everyone. This makes it clear that workflex allows for everyone to be heard, but only if they fully participate in making it work.
6. **Removing workflex is a poor punishment.** Withholding workflex as a punishment or motivator can make matters worse by adding additional stress (such as restoring a tiring commute on top of long workdays). Work with employees to determine if workflex has anything to do with poor performance. If so, make adjustments and/or show that the way they are workflexing isn't effective for them. If the problem doesn't resolve, it's best to move through the normal performance improvement options up to and including separation without removing the workflex. Forcibly removing workflex will likely only earn you resentful employees and more work micro-managing them.

Section IX: Maintaining Fairness

Some managers are wary of workflex because they feel uncomfortable with allowing people to work in different ways. Concerned about fairness, they or their team may see different workflex options as a sign of favoritism or discrimination. If you follow the tips below, you should be able to explain fairly easily how different workflex options are both fair and legal.

- 1. Equity not equality.** Sometimes employees believe they should all be treated in the exact same way. In the case of workflex, equity means that employees receive access based on whether their specific job requirements are compatible with the workflex they request. This differs from equality, where everyone has the exact same level of access to all workflex options regardless of what they do. Emphasizing equity allows for tailored arrangements that can adapt to differences in personal and organizational circumstances over time. Equality is an all or nothing gamble that more often than not will result in no one having access to workflex. Given that understanding, employees will probably favor equity over equality.
- 2. Job based workflex.** The equity approach requires that you determine access to workflex based on job responsibilities — not individual characteristics — and apply that access consistently across employees with the same job responsibilities. As noted in Section X, denying access to workflex is a poor punishment and should not be used as a stick or a carrot. In addition, access to workflex should be reason neutral. Whether an employee uses workflex to care for children or an elder, run a marathon or play video games doesn't matter and should not affect whether they get access to workflex. The one possible exception to reason neutrality would be requests for workflex as a form of reasonable accommodations under the Americans with Disabilities Act ("ADA"). However, if you do find a way to provide flexibility for an employee with a disability, consider whether that same method can be expanded to more employees.
- 3. Don't manage to the worst employees' level.** Managers can make the mistake of setting rules for everyone designed to contain the excesses of their least competent employees' behavior. This is often a way to avoid uncomfortable conversation of direct confrontation with a problem employee's poor performance. However, holding everyone back just incentivizes high performers to reduce their output to the level of respect and opportunity you provide them. It's better to offer options that show you trust and wish to grow your team. Deal with problem employees directly through conversations, performance improvement plans and possibly separation.
- 4. Study up on your organization's policies.** While it is primarily an HR responsibility to draft policies, you should be aware of the current policies in your organization and be able to explain them to your team. Make sure employees have access to descriptions of any workflex programs that include explicit statements around:
 - your organization's intent regarding the telework policies;
 - how decisions about telework eligibility are made, and how conflicts between telework schedules will be adjudicated;

- your organization's focus on an equitable workplace and the difference between equity and equality; and
- how telework is not a right or entitlement, and that, while some positions are conducive to certain telework arrangements, other positions simply are not.

Providing employees with this information upfront will create a foundation for constructive conversations and will support your position in any discrimination proceedings.

Section X: Frequently Asked Questions

The following questions are from managers at companies that participated in the 2015-2016 When Work Works Award process. They represent some of the more common issues (beyond those described in the Telework Guide and building flexible teams described earlier in this Guide) that managing flexibly raise for managers.⁸

1. How much is too much flexibility? There's no such thing as too much flexibility, though certain situations can make you feel like you've given too much. If you are feeling that way, step back and consider one of these alternative explanations and the solutions below:

- **Problem:** There's not enough communication, planning and accountability to ensure everyone is able to perform at their best. **Solutions:** focus on improving your communication methods or frequency. Have a list of questions people have to answer in an email to the entire team about their flexibility every time they adjust it. Try sharing calendars or setting standard check-up meetings.
- **Problem:** The wrong type of workflex solution has been applied (e.g., allowing someone whose job requires managing with frequent unscheduled, drop-in clients to telework regularly). **Solutions:** Discuss other workflex options that achieve the same goals. For example, more employee influence over shift scheduling might work as well as telework for some employees. Focus on achieving the work and personal goals, not the particular form of flex used to do so.
- **Problem:** The workflex options have been decoupled from the shared goals. (For example, flexibility is seen as a right rather than a tool for mutual success.) **Solutions:** A clearly defined culture of flexibility is essential, empowering employees to properly prioritize and support each other's work. Make sure your spoken and written flex statements explain why flex is in place: to do good work on and off the job. Workflex that is not helping to achieve those goals is not a useful tool and will be replaced with other ways of working.
- **Problem:** Some people don't realize workflex is a team sport. (For example, they don't communicate their schedules or pitch in to help others use workflex effectively.) **Solutions:** Ordering people to be more cooperative is often not very effective. Instead, regularly and publicly recognize those people who do support one another to be flexible. Remember to also praise overworkers for using workflex as much as for helping others be flexible. Uncooperative employees will want to also be highlighted and will be incentivized to seek recognition.
- **Problem:** Workflex is mistaken for managerial weakness. (For example, respect for managers is based on their power over staff, not the effectiveness of their teams.) **Solutions:** Managers in cultures that mistake employee autonomy for managerial weakness may fear being flexible. To maintain their reputations, managers should regularly and openly frame their use of workflex as a strategy for achieving their goals and then show how those goals have been achieved. Given some time, success will trump authority, but only if a manager is ready, willing and able to stand up for the strategies that make them and their teams more successful.

- 2. Does it matter if my fellow managers are more/less flexible than I am?** In general, it is preferable for organizations to be consistent in how they apply policies like flexibility both for morale and for legal reasons. However, flexibility is by nature variable, depending on the people and situations involved. So, there will probably be some differences in how you and your peers manage flexibility. It can be helpful to speak with your peers and come to some consensus on how flexibility is to be managed across similar employees and teams. Such conversations can encourage more flexibility or help share best practices about how flexibility can and should be managed to best effect. If you deviate from the organizational norm, it's important to have a written, legitimate, non-discriminatory explanation of how and why you will be providing more/less flexibility and keep to that framework, as any inconsistency could potentially be used in a discrimination case. Such an explanation will also make it easier to explain your rationale to employees, so they can either accept your logic or provide considered suggestions for making more flexibility work for the team. If you have any question as to whether your justification meets the legitimate, non-discriminatory standard, you should check with your HR or legal team for confirmation.
- 3. How do I balance the need to support the client and employee need for predictable, uninterrupted time off?** The thing that matters most to the majority of clients is getting what they need quickly, accurately and with little fuss. They tend to be less concerned with who gives it to them. Teams that are cross-trained and that regularly communicate about their projects and the location of essential files are able to help clients, even when one or more employees are unavailable. Making sure employees know that they are mutually responsible for both the client and each other's time off prompts more proactive and constructive conversations and actually improves performance.⁹ Don't forget to ask clients about deadlines; you may not need to interrupt an employee's time off if you aim to meet the actual deadline rather than just the soonest you can deliver content. Also, work with clients to draw a distinction between low and high priority deliverable, so you know what products are worth expending employee morale on producing as soon as possible and which could reasonably wait without impacting client satisfaction.
- 4. How do I build trust among my workflexing team members?** In a workplace, trust can be described as the belief that even when unobserved employees and managers will, firstly, not act against each other's interests and, secondly, will do their best to support each other's interests. The first form of trust focuses on not doing harm when someone leaves themselves vulnerable. For example, a manager trusts that an employee who is teleworking will get their work done well and on time and be responsive to requests from the manager. The second form of trust is the idea that, when offered a chance to advocate on behalf of each other, teammates will do so. For example, a manager in a meeting with important leaders will proactively draw attention to the contributions of teleworkers who might otherwise be unrecognized.

To build the first form of trust, managers should first engage in small acts of vulnerability with low costs for failure. This means giving employees opportunities to act independently on projects where failure to deliver would be more of an irritant than a problem (for example, working from home or adjusting their work schedules during slower work periods when

there is time and resources to recover from any mistakes). This gives the employee the opportunity to demonstrate their decision-making skills and their willingness to prioritize the organization's needs along with their own. As time passes, the manager should allow employees more autonomy to manage their own work, pull back from direct guidance and encourage employees to raise issues for feedback independently. Over time, the manager will feel more comfortable trusting the employee to do no harm, and the employee will feel rewarded with the appropriate amount of autonomy for their skills and position.

To build the second form of trust, managers need to first understand their employees' interests. Making assumptions about what an employee wants (especially during a transition to caregiving) can make good intentions go wrong and damage trust. Once you know what an employee wants (e.g., more exposure, more flexibility, more developmental projects), you can strategize about how to support those interests in appropriate ways. For example, if one employee is feeling overworked and another is not getting enough developmental opportunities, advocating for a redistribution of work during a senior planning meeting would benefit everyone and get the work done. It is important to update employees on the efforts you make to support their interests; efforts that happen behind closed doors won't increase trust unless employees understand how decisions were ultimately made.

Also keep in mind that research has shown that, in general, employees are more concerned with how decisions are made (procedural justice) than the ultimate results or what they get (distributive justice). Transparency around decision making is much more important to building trust than delivering what an employee wants every time. So, saying no to a workflex request may be fine as long as employees understand why and have the opportunity to either try to change your mind or adjust the circumstances to match your requirements for the workflex they want.

5. How do I establish and maintain expectations around responsiveness? Responsiveness — or how quickly employees should answer communications — is one area that is often very confusing because it is too often implied rather than explicitly stated. Managers should take the initiative to tell employees what they generally expect to be the turnaround time on communications. To manage these expectations, answer these questions for your employees:

- During core business hours, what is the maximum amount of time that an email or voice mail can go unanswered before you begin to worry?
- Are employees expected to check their messages during off hours and weekends? If so, what is the maximum amount of time that a message can go unanswered before you begin to worry?
- Do these expectations change when an employee is traveling or engaged in special projects or a busy season?
- Do you want employees to acknowledge receipt immediately or only after they have made some progress on a request?

- When your request is for an employee to do something for a third party, do you want them to include you in follow-up communications or handle the situation independently?
- Will you use flags for greater/lesser than normal importance for a communication (e.g., using the phone for things requiring immediate attention and email for things that are less critical).

The answers to these questions will change from time to time, so it is helpful to set a general standard and include any changes from those norms in your communications (for example, noting if you need a response sooner or later than usual).

It is a good idea to provide this information to employees during job interviews, so they know what they are agreeing to before signing on to a job or team.

6. How do I coordinate schedules among workflexing employees, especially when their desired schedules conflict? The process described in Section VII is focused on making flexibility a team sport and helping employees to collaborate with each other and their managers to create work processes and schedules that benefit everyone. However, there will be times when the flex requested by two or more employees will conflict with one another and/or the work that needs to be done. There's no single right way to resolve such conflicts, but the guidelines below provide some important things to consider when setting up how you and your team will manage them:

- **Collaboration.** First, let employees discuss their needs and see if they can come to a mutually beneficial alternative. It may be a good idea for you to facilitate to make sure that employees with stronger personalities don't pressure others into accepting poor solutions; but the goal is to give them the chance to work out something they will both accept.
- **Seniority.** A simple, unambiguous solution is to let the person with the greater tenure make the choice. In today's work environment where people frequently change jobs, a focus on seniority may seem unfair to people, especially if their contributions to the team or the usage of the flexibility seem unequal. Seniority might be used as a tie breaker, but isn't a great place to start these conversations.

If you are in a union setting, you may need to respect seniority at the end of any conflicts; however, you don't have to start there. Request a conversation with the employees involved in a workflex conflict. Frame the discussion as an effort to find a way to take care of everyone while still respecting the limits of any contracts. The rights of employees with seniority may allow more win-win solutions to be developed.

- **Usage of the flexibility.** On the one hand, knowing how workflex will be used may suggest alternatives (such as taking a different day off or using a different form of workflex to meet the need). On the other hand, such knowledge opens the door to judgments about who is spending their workflex in the "best or most important" way. When considering how workflex will be used, it is important to use this knowledge to enhance tactical

decision making and not judge one employee's personal life as more valid or worthy of workflex than another's life.

There will be situations where specific requests may be very different in magnitude (e.g., attending a child's graduation vs. a day lounging in the park). In these cases, it is reasonable to consider the use of flexibility to break a tie. Explain to employees the criteria for judging one event as more important than another event (e.g., a graduation happens only once and can't be rescheduled). Do not make the decision based in demographics (e.g., parent or not), as that results in a situation where one employee's life is always considered more important and will likely create more conflict in the team.

- **Revisit the work demands.** Often workflex is discussed in terms of maintaining the same means of production rather than the same ends. Consider whether work can be restructured to resolve the workflex conflict.
- **Novel solutions.** If simple negotiation isn't working, then it may be time to consider a novel solution with everyone involved (other members of the team may also come up with ideas to resolve an impasse). For example, if two employees both want the same day off and neither can budge, consider asking them to take the day off unpaid and using that money to hire a temp to make sure work continues while they are both gone. It is important to check with your HR and legal departments to make sure any novel solutions are consistent with all local, state, and federal laws as well as any union contracts. Once vetted, a novel solution can be added to the organization's toolbox of workflex options for the future.
- **Equity and consistency.** It's essential to develop consistent standards for how you make decisions to resolve workflex conflicts to maintain a sense of fairness and avoid any liability. Ideally, employees will absorb those standards and apply them independently during their workflex collaborations so that conflicts will be resolved earlier and more easily.

7. How do I provide flexibility for nonexempt employees? Under the Fair Labor Standards Act (FLSA), employers are required to maintain certain records for each nonexempt worker, including hours worked each day, the total hours worked each workweek, total overtime earnings for the workweek, and the like. This requirement can create confusion around providing flexibility for nonexempt employees, especially if that flexibility might result in unsanctioned overtime hours (a common concern, especially around for telework). However, with the right setup, nonexempt employees with the right job tasks can also work flexibly. To provide workflex for nonexempt employees, make sure you have the following:

- **A time tracking system** that can...
 - o *Be accessed remotely.* A number of software programs facilitate this process by allowing employees to "clock in" or "clock out" using computers that can potentially be located anywhere. Such systems provide a reliable method for proactively monitoring timekeeping to ensure accurate records and obtaining the employee's "signature"

(whether in paper form or electronic) on the timesheets to prevent the employee from subsequently challenging the accuracy of those time records.

- o *Accommodate a variety of schedules.* Make sure your system can accommodate variations in when hours are worked, such as allowing employees to work fewer, longer days (compressed workweeks) or have multiple, variable start and stop times throughout the day (for greater flexibility in breaks and schedules).
- **Clear, well-publicized policies on what constitutes “hours worked.”** Under the FLSA, non-exempt employees’ hours worked are usually calculated based upon the time when the employee begins his/her “principal activity” and the time on that day at which he/she ceases the “principal activity.” Other categories of time may or may not be compensable, depending upon the circumstances (such as travel time, rest/break times, etc.) For each type of nonexempt position that qualifies for any amount of flexibility, ensure that you and the employee agree upon a clearly articulated understanding of what time is to be tracked and how (e.g., rest and meal breaks). Be as explicit as possible about when an employee should not be working (e.g., unpaid work breaks of 30 or more minutes) and his/her discretion about adjusting breaks and work schedule. (For example, can an employee work through lunch and end early? Keep in mind whether your systems can accurately track those variations.) Review federal and state specific laws that may affect your organization’s policies.
- **Specific Overtime Expectations.** To avoid unauthorized overtime, managers should be well versed on their organization’s overtime policy and its prohibitions for working any hours over 40 in a given workweek without advance written authorization from one or more specified individuals (usually you as the manager). If such a policy is not in place, you should prompt your employer to establish one as soon as possible. Once you have the policy, have a detailed conversation with your team to make sure they know how to handle common situations like:
 - o receiving an employer/client request to work through their normally scheduled lunch breaks;
 - o making a request to adjust their start, break and stop times to a different, 40-hour schedule; and
 - o times where there is more work than can be accomplished in a 40-hour week and work redistribution, overtime, and/or upstaffing are required.

Be sure to emphasize the importance of never working off the clock or under/over reporting hours worked.

Ideally, HR will provide forms where employees can provide a signed and dated acknowledgment of their understanding and acceptance of the flexibility, overtime and time tracking policies. If no such form is available, work with HR to create one.

If an employee fails to obtain prior approval for overtime hours reported, the employer must still pay the overtime, but you should take remedial action with respect to the employee's failure to comply with the policy. For more information regarding employer recordkeeping responsibilities under the FLSA, one valuable free resource is the Wage and Hour Division's Fact Sheet, which can be found here: <http://www.dol.gov/whd/regs/compliance/whdfs21.htm>

8. Where do I go for more information? When Work Works has a variety of resources to provide managers with more information about how to lead flexibly, even in unconventional situations and industries. The [When Work Works Website](#) hosts these and other free downloadable resources:

The [National Study of Employers](#), is a free, downloadable series of reports that provide over a decade of information about the policies employers throughout the U.S. use to support and develop employees.

The [Workflex Guide Series](#) is a collection of free, downloadable guides to providing workplace flexibility in a range of settings such as manufacturing, retail, hospitality, health care and small businesses.

The [When Work Works Award](#) provides a free benchmarking report describing the results of both a robust employer policy assessment and results of a free employee survey measuring how those policies are contributing to an effective workplace.

The When Work Works [Workflex Assessment](#) — based on the prestigious [When Work Works Award](#) — is a free online questionnaire that will let you know how your organization's employee policies compare to the nation and your industry. It takes about 15 minutes to do and you get your score immediately upon completion.

In addition to these free resources, When Work Works has also produced the comprehensive guide to workplace flexibility in the form of [Workflex: The Essential Guide to Effective and Flexible Workplaces](#). This publication — written by workplace experts at the Families and Work Institute (FWI), the Society for Human Resource Management (SHRM), and a host of other well-known voices in the field — provides a workflex roadmap for those who are serious about implementing workflex and effective workplaces in their organization. This Guide also includes many templates and forms for your use in building reliable tracking and reporting mechanisms for your workflex efforts.



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Section XI: Tips from the Trenches

The following quotes are from managers at companies that participated in the 2015-2016 When Work Works award process. They represent a small selection of the many ways in which managers are using flexibility to enhance outcomes for themselves, their staff and their organizations.¹⁰

We permit employees to start their day at 7 a.m. from home in order to allow the employee to get kids to school and then come into the office afterwards. This allows the employee to keep a full 40-hour work week without staying until 6:30 or later each evening.

– Manager at Northwest Lineman College - Meridian, ID

Two-thirds of my team works from home 2 to 3 days a week, with individual agreements on meeting attendance, communication expectations and mutual trust.

– Manager at Healthwise - Boise, ID

One associate needed to adjust her schedule to attend school and still work her standard number of hours. We were able to arrange her schedule to spread her work over five days rather than the standard four-day workweek.

– Manager at 1-800 Contacts - Draper, UT

It was hard to offer our receptionist position flexibility since it is important for the company to have someone at the front desk at all times. We split the position into two part-time roles to allow for more flexibility with general work hours free to take care of personal business and the ability to switch shifts and cover for each other as things come up.

– Manager at Healthwise - Boise, ID

We use our calendars a lot to show who is going to be in/out of the office. Also, we've changed our review process so that we are not moving papers from one desk to another. We use email to review and provide initial feedback to each other; that way, no one feels like they need to be in the office. On days we are all in the office, though, we take our lunches together to catch-up and have face-time to make up for the days when we only have virtual conversations.

– Manager at Ryan, LLC - Overland Park, KS

Our jobs involve travel out of town or state. I allow team members to [return to] town on Thursday afternoons. Friday is kept light on work meetings so team members can take care of [personal] in-town commitments on Fridays that could not be handled over the weekend.

– Manager at KPMG LLP -
Minneapolis, MN

During the busy season, we are required to work at least 55 hours a week. My team and I decided to work 11 hours each day in order to have weekends off.

– Manager at BDO USA, LLP - Miami, FL

I advocate staff take advantage of our flexibility policies — working from home, working a compressed workweek and taking care of personal business during the work day. They understand that what affords us this flexibility is continuously delivering on what is expected from us as a team. They know that I will ask them to change a plan if it is critical to the business. If a team member is not carrying their weight, I will deal with it. I assign my team big goals, equip them and let them go.

– Manager at National Student
Clearinghouse - Herndon, VA

My general rule: Set expectations early. Guide work productivity based on output and outcomes, and leave management of input (time spent) and process (how to produce) to my team.

– Manager at HawaiiUSA Federal Credit
Union - Honolulu, HI

By knowing their schedules and commitments. One employee on my team picks up her child between 5:00 and 6:00 pm, but will handle things once she puts her child to bed. If I send her a message around that time, I'll mention that I know she can't answer now, but to please do so when she can — and she always does!

– Manager at KPMG LLP - Short Hills, NJ

Flexible hours has allowed me to maintain consistent coverage during work hours even when an employee is not able to come to work either due to family issues or other circumstances. This also has allowed us to keep a healthier workplace because staff that feel "under the weather" do not feel obligated to come into the office to make others sick. They can still work through a mild illness at home and still be productive without risking others' health.

– Manager at Blum Shapiro & Company, P.C. -
West Hartford, CT

One employee, with an important operational role, had the opportunity to participate in a unique life event requiring approximately six to eight weeks off work. We decided to allow this person to take the time off unpaid, with all other benefits in place. We hired a temporary employee for support. The person we helped returned to work, extremely grateful for the flexibility.

– Manager at Atomic Object LLC - Grand Rapids, MI

My general rule: Set expectations early. Guide work productivity based on output and outcomes, and leave management of input (time spent) and process (how to produce) to my team.

– Manager at MorganFranklin Consulting - McLean, VA

My team has a daily check point meeting to keep each other accountable and share information with the entire team. This meeting helps my offshore team a lot. It also provides the flexibility for the U.S. team employees to work from home and still get the same information everyone else hears. We also use the messaging application extensively with the offshore employees for instant two-way communication.

– Manager at Ryan, LLC - Cedar Rapids, IA

I strive for two-deep coverage on all tasks/requirements, so that if an individual is out of the office, the work can still be accomplished by alternate personnel. I also try to ensure that I have knowledge of all work being performed, for the purpose of providing cross training or if necessary, the ability to perform the task.

– Manager at Zenetex, LLC - Havelock, NC

A number of employees pitched in to donate our PTO to a team member who was going on paternity leave. Donating PTO had unfavorable tax implications, so instead, we arranged for the organization to pay the team member the equivalent dollar amount of the PTO.

– Manager at The Climate Trust - Portland, OR

My team makes heavy use of remote/asynchronous communication through email and chat to trade assignments with short deadlines that aren't compatible with personal schedules. As long as the trades are roughly equal and no one feels like they are required to do another person's share, this has proven to be a good way of accommodating personal preferences in a 24/7 deadline environment.

– Manager at Research Square - Durham, NC

As developers, we plan out all the work we're going to do over the next two week period. Then, we can look back and see how much of it we actually finished. As a result, the things we do during a single day are pretty insignificant compared to our overall performance.

– Manager at Research Square - Durham, NC

We focus on cross training and developing leaders so that we can take time off and others can step in. We have created a 5:00 pm calendar, so that those of us who can't stay until 5:00 pm know that our customers will be taken care of in our absence. Employees sign up for the days they want to stay late. We have worked it out so that our customers have their needs met and don't even know that we aren't there, as long as a team member is helping them they feel cared for.

– Manager at CS Partners - Brighton, MI

Flexibility is great when working around the globe. We are able to provide testing and problem solving almost around the clock through communicating and transferring ownership to colleagues in India, Europe and the USA.

– Manager at d-Wise Technologies, Inc. - Morrisville, NC

I have an employee who is from India and works in the U.S. He wanted to take an extended time to see his family in India, and I was able to set it up so he got his three weeks of vacation, and then worked remotely from our India office for three additional weeks.

– Manager at Visteon Organization - Van Buren Township, MI

The majority of my team work remotely at least one day per week, and I have seen increased job performance and satisfaction [as a result]. Having the ability to work flexibly (attend school events, personal issues, etc.) has increased engagement and helped build positive relationships. It also increases the "team" mindset — others on the team are always willing to pitch in when their teammates have personal concerns that come up, etc.

– Manager at Amerisure Mutual Insurance Company - Farmington Hills, MI

Endnotes

¹ Source: 2016 National Study of the Changing Workforce. New York, NY: Families and Work Institute. See <http://www.familiesandwork.org/national-study-for-the-changing-workforce/> for more information.

² Ibid.

³ Aumann, K. & Galinsky, E. (2009). *The State of Health in the American Workforce: Does Having an Effective Workplace Matter?* New York, NY: Families and Work Institute.

⁴ Source: 2016 National Study of the Changing Workforce. New York, NY: Families and Work Institute. See <http://www.familiesandwork.org/national-study-for-the-changing-workforce/> for more information.

⁵ Bloom, N., Liang, J., Roberts, J., & Ying, Z.J. (2014). Does Working from Home Work? Evidence from a Chinese Experiment. *The Quarterly Journal of Economics* 130 (1), 165–218. Accessed online on 1/15/2016 at <https://people.stanford.edu/nbloom/sites/default/files/wfh.pdf>.

⁶ Source: 2016 National Study of the Changing Workforce. New York: Families and Work Institute. See <http://www.familiesandwork.org/national-study-for-the-changing-workforce/> for more information.

⁷ Perlow, L. (2012). *Sleeping with your Smartphone: How to Break the 24/7 Habit and Change the Way You Work*. Boston, MA: Harvard Business Review Press.

⁸ Managers' questions have been lightly edited for clarity and brevity.

⁹ For more information about how to structure these conversations, see Perlow, L. (2012). *Sleeping with your Smartphone: How to Break the 24/7 Habit and Change the Way You Work*. Boston, MA: Harvard Business Review Press.

¹⁰ Managers' quotes have been lightly edited for clarity and brevity.

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When Work Works is a nationwide initiative that brings research on workplace effectiveness and flexibility into community and business practice. Since its inception in 2003, When Work Works has partnered with an ever-expanding group of communities from around the country to: share rigorous research and employer best practices on workplace effectiveness and flexibility; inspire local employers to create more flexible and effective workplaces to benefit both business and employees; and recognize exemplary employers through the When Work Works Award and local community events. www.WhenWorkWorks.org



The **Society for Human Resource Management (SHRM)** is the world's largest HR professional society, representing 285,000 members in more than 165 countries. For nearly seven decades, the Society has been the leading provider of resources serving the needs of HR professionals and advancing the practice of human resource management. SHRM has more than 575 affiliated chapters within the United States and subsidiary offices in China, India and United Arab Emirates. Visit us at shrm.org.



Families and Work Institute (FWI) is a nonprofit center dedicated to providing research for living in today's changing workplace, changing family and changing community. Since the Institute was founded in 1989, our work has tackled issues in three major areas: the workforce/workplace, youth and early childhood. In 2016, Mind in the Making, our major child development initiative, became a program of the Bezos Family Foundation and the National Study of the Changing Workforce, the National Study of Employers and When Work Works became projects of the Society for Human Resource Management (SHRM). www.familiesandwork.org

Workflex Guides



Managers

When Work Works produces Workflex Guides to help businesses and organizations explore ways to #ReinventWork and create effective and flexible workplaces for their employees.