

# National Workplace Flexibility Study Reveals Best Practices for Managers Leading Flexible Teams

Twitter: [#workplaceflex](#)  
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BOSTON COLLEGE  
Center for Work & Family  
CARROLL SCHOOL OF MANAGEMENT

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# Agenda

- Introduction
- Why study managers?
- Study Process
- Manager concerns about flexibility
- Flex Team Blueprint
- Study findings
- Next steps



# National Workplace Flexibility Team



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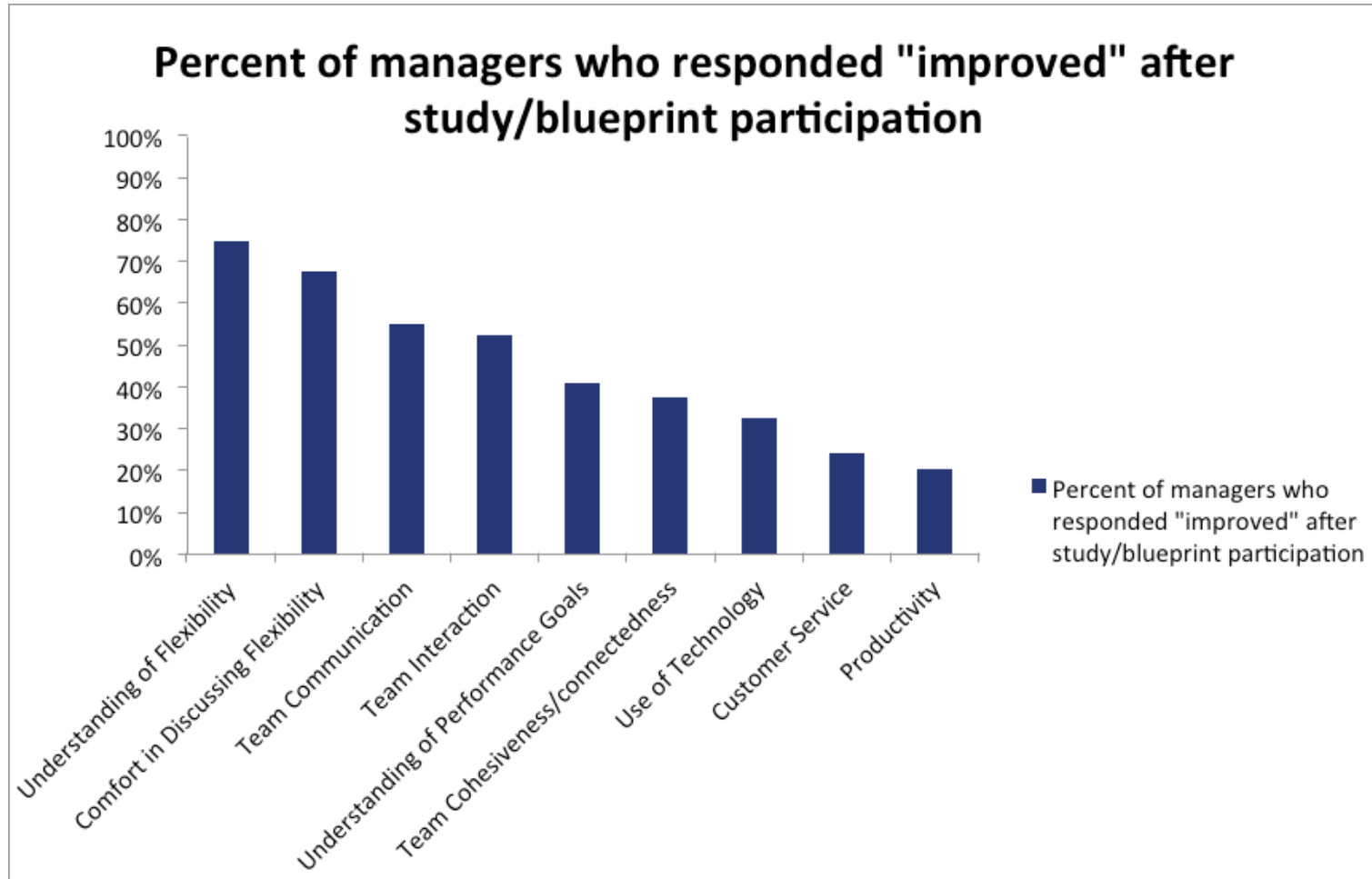


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# National Workplace Flexibility Study Partners

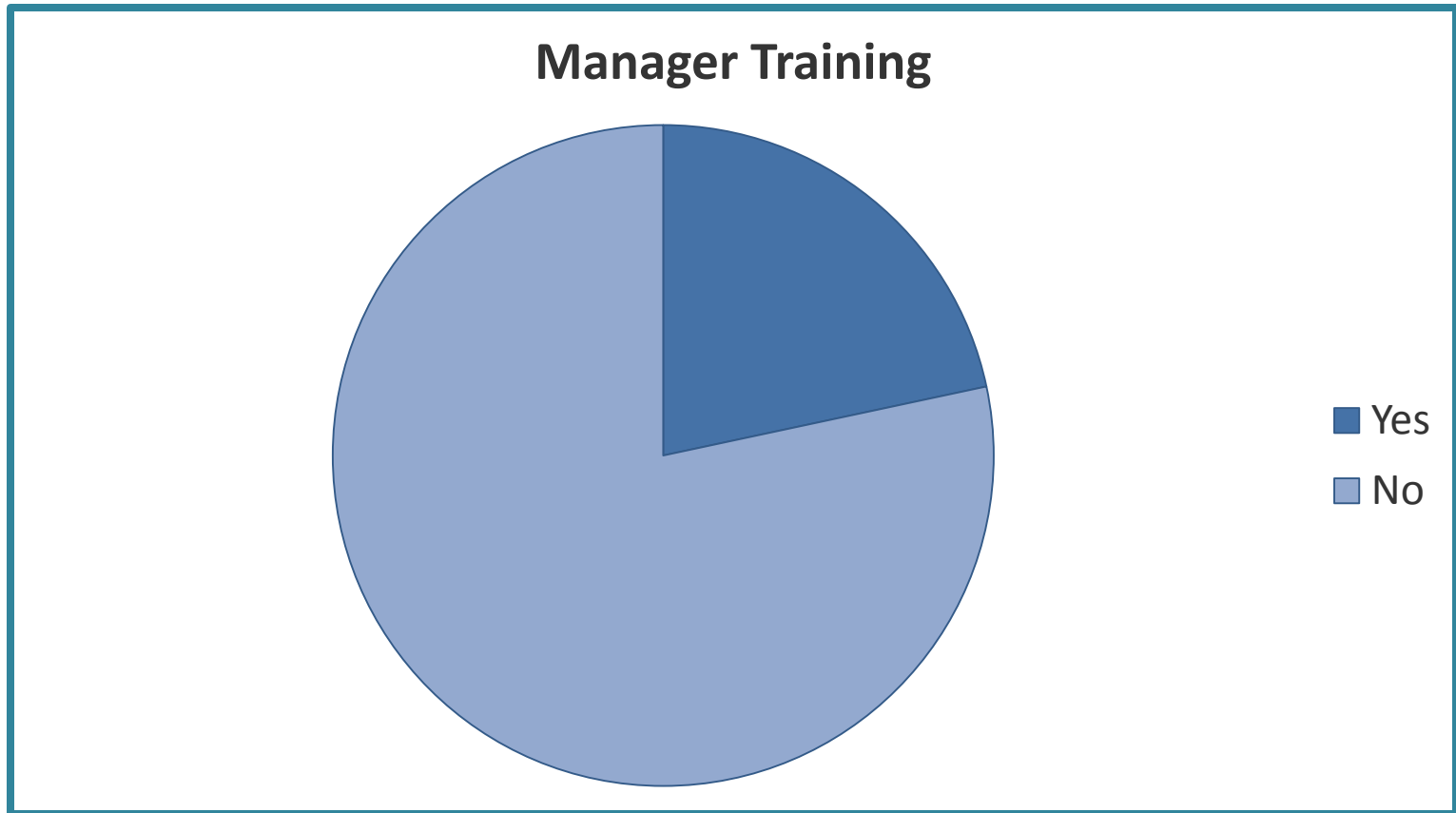


# Overall Manager and Team Benefits



# Flexibility Training for Managers

- Is training provided to managers about how to successfully manage employees with flexible work arrangements? (n= 455)



# Polling Question

What does workplace flexibility look like at your organizations?

1. What is workplace flexibility - 1%
2. Ad hoc flex is used as needed - 24%
3. We have a policy and have communicated flexibility, but don't have a lot of utilization - 29%
4. Flexibility is integrated into how we work - 46%



# National Workplace Flexibility Study Purpose

## Goal:

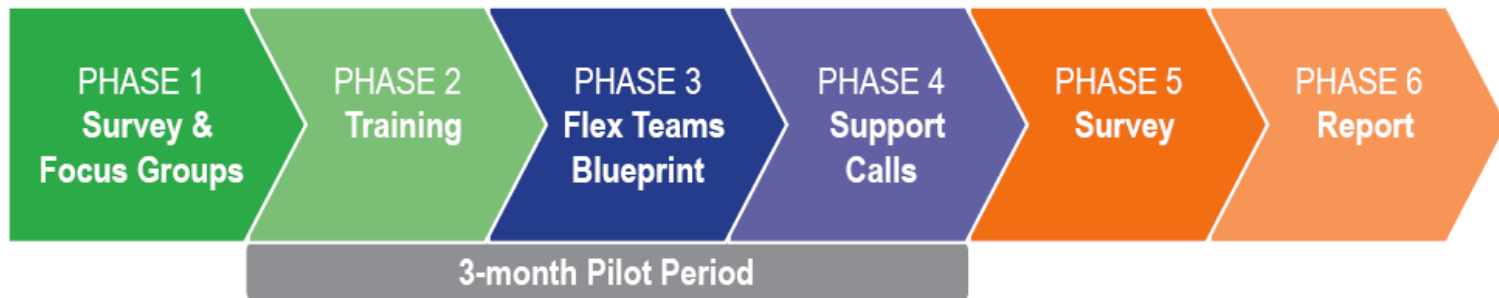
- Middle manager resistance identified in past studies as barrier to full scale implementation
- Reduce manager resistance and improve business results by providing managers with a process to apply flex at a team level
- Determine role of support activities for managers in culture change





# Process

## NATIONAL WORKPLACE FLEXIBILITY STUDY PROCESS



# What Managers Really Think of Flex

Video can be found here:

[What managers really think of flexibility](#)



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# Phase 1: Top Manager Concerns About Flex

- Tech support/help desk for remote work
- Negative impact on productivity
- Policies are ambiguous or unclear
- Negative impact on customers
- Don't understand how to evaluate requests
- Staying connected as a team
- Managing employees on flex makes my job more complicated
- Not sure if employees are working when I can't see them
- Perception of playing favorites
- Flexibility is used inappropriately



# Phase 2 : Flex Team Training

- Flex Team Agreement (Values & Behaviors)
- Communication and Team-Building Tactics
- Performance Management Strategies
- Culture Map
- Technology Optimization
- Individual and Team Metrics



# Phase 3: Flex Team Blueprint

## Team Alignment Blueprint for Team B

### Section 1: Values and Behaviors

The goal of this agreement is to identify the values and actions that each of us should exhibit as a member of this team.

Our professional commitment as a team is to our clients and delivering high quality engagement results, while adhering to our Firm policies and procedures. Our goal is to accomplish this high level of client service by juggling our professional responsibilities with our personal needs throughout each day, week, or month. As this mission is driven heavily by client service, this agreement is guided by our designated ClientService Principles. These are our "rules of engagement" as a team in consideration of our flexible working environment. *We recognize the lack of adherence to this Flex Teams Agreement will limit our ability to participate in the flexible work environment and may result in disciplinary action.*

1. Ethics, Results & Efficiency
  - a. We commit to being an expert and trusted tax advisor with respect to sales and use tax in our operating states.
  - b. We will operate within the highest ethical standards when interacting with clients, taxing authorities, and the team.
  - c. We will escalate any client service failures immediately to our manager regardless of working status.
  - d. We will communicate and consider the Client's best interests in determining workplan strategies, timelines, and recommendations on projects.
  - e. We understand that delivering the most high-quality, thorough and accurate work product sometimes means long hours or extra commitment to achieve the best customer service.
  - f. We will manage the client's expectations by asking questions regarding desired scope of work, timelines, communication, and availability. We will document and manage the client's requests in these areas to deliver as promised and exceed their expectations.
2. Accessibility & Communication
  - a. When we are working:
    - i. We will be accessible to clients and Firm employees by phone during the normal business hours of 8:30 a.m. CST through 5:30 p.m. CST.

### Section 2: Performance Management Strategies

Here are the ways we agree to keep each other "in the loop" about progress toward our individual and collective goals:

1. One-on-One meetings- these can be live, virtual, or by phone as long as an agenda is prepared and project workplan updates are incorporated and discussed.
2. Firm Approved Project Workplan
3. Project Tracking- this is the team preferred method for managing day-to-day activities, information capture and sharing, progress and needs.
4. Weekly Flash Report- Bullet point e-mail that addresses goals for the week.
  - a. Establishes tasks completed, obstacles, and next steps.
  - b. For scheduling steps within an engagement, Flash Report should include a summary of scheduling status and estimates of projected tax.
  - c. Due to close team environment, this e-mail should be addressed to Manager and copied to all team members to promote knowledge sharing.

We've come up with some new strategies for how to reward, thank, motivate, transfer knowledge, and more...

1. We will work to communicate with each other about training opportunities that we could benefit from as a team to promote combined education and discussion.
2. Flash Meetings- our team will incorporate a new approach to calling quick "flash" meetings with all team members to address personal or professional topics relevant to the team. These can be initiated by any individual on the team and can be done by Lync conference, calendar request, or in-person round-up. Of course, this should consider the availability of all team members. This would not only provide a quick break from the norm, but, also promote leadership experience in heading up a discussion, as well as knowledge sharing and open forum around pertinent topics.
3. Acknowledgements- During our monthly team meeting, each team member will have the opportunity to share two acknowledgements for the previous month. One for themselves and one for someone else. The manager will then take a moment to vote for the best personal acknowledgement. Then, all acknowledgements will be added and the person with the most for the month wins a prize.
4. We will continue to schedule lunches or events to celebrate accomplishments or give thanks to team members.



# Phase 4: Manager Support Activities

- Weekly Reinforcement Emails
- 2-Weeks Post Training/Coaching: Manager Blueprint for Flex
- 6-Weeks Post Training/Coaching: Where are You on the Flexible Manager Scale?
- 12-Weeks Post Training/Coaching: Best Practice Sharing



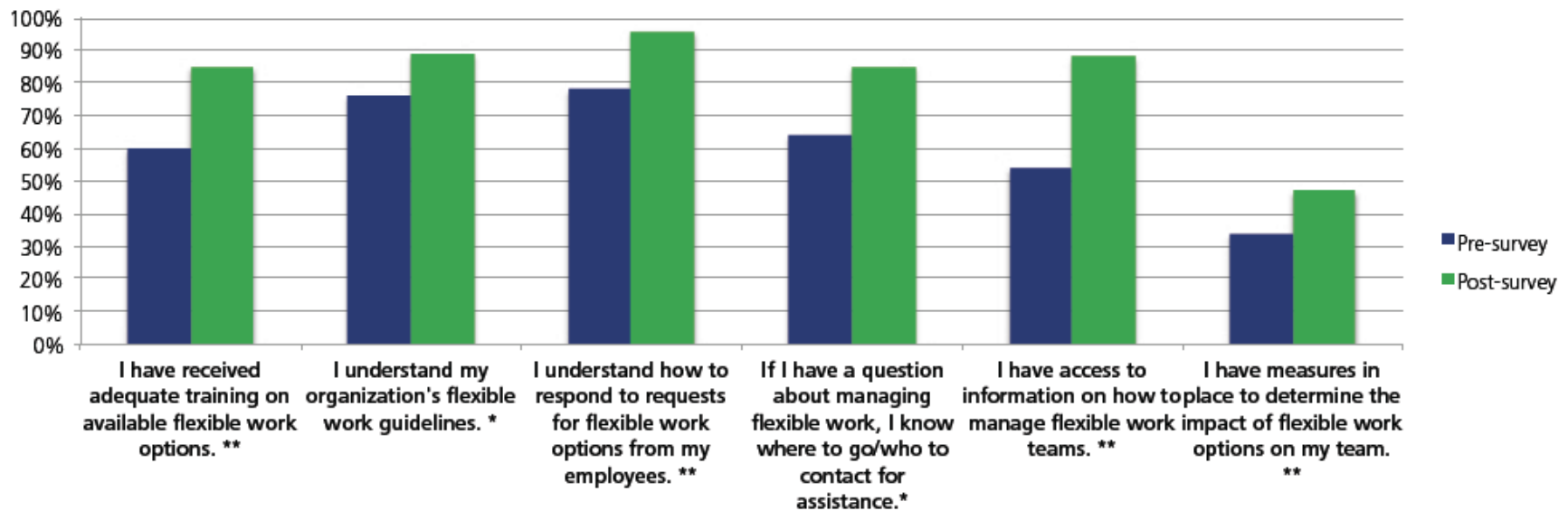
# Study Findings

- Managers feel more knowledgeable and better prepared to lead flexible teams.
- Manager concerns related to flexible work decreased.
- By engaging managers in flex activities/communications, employees' attitudes about flex changed as well.
- Employees perceive their managers to be more supportive of flexibility.
- Perception of leadership support for flexibility improved.
- Organizational culture shifted in a positive direction.
- Engagement scores increased.



# Managers' Understanding of Flexibility Increased

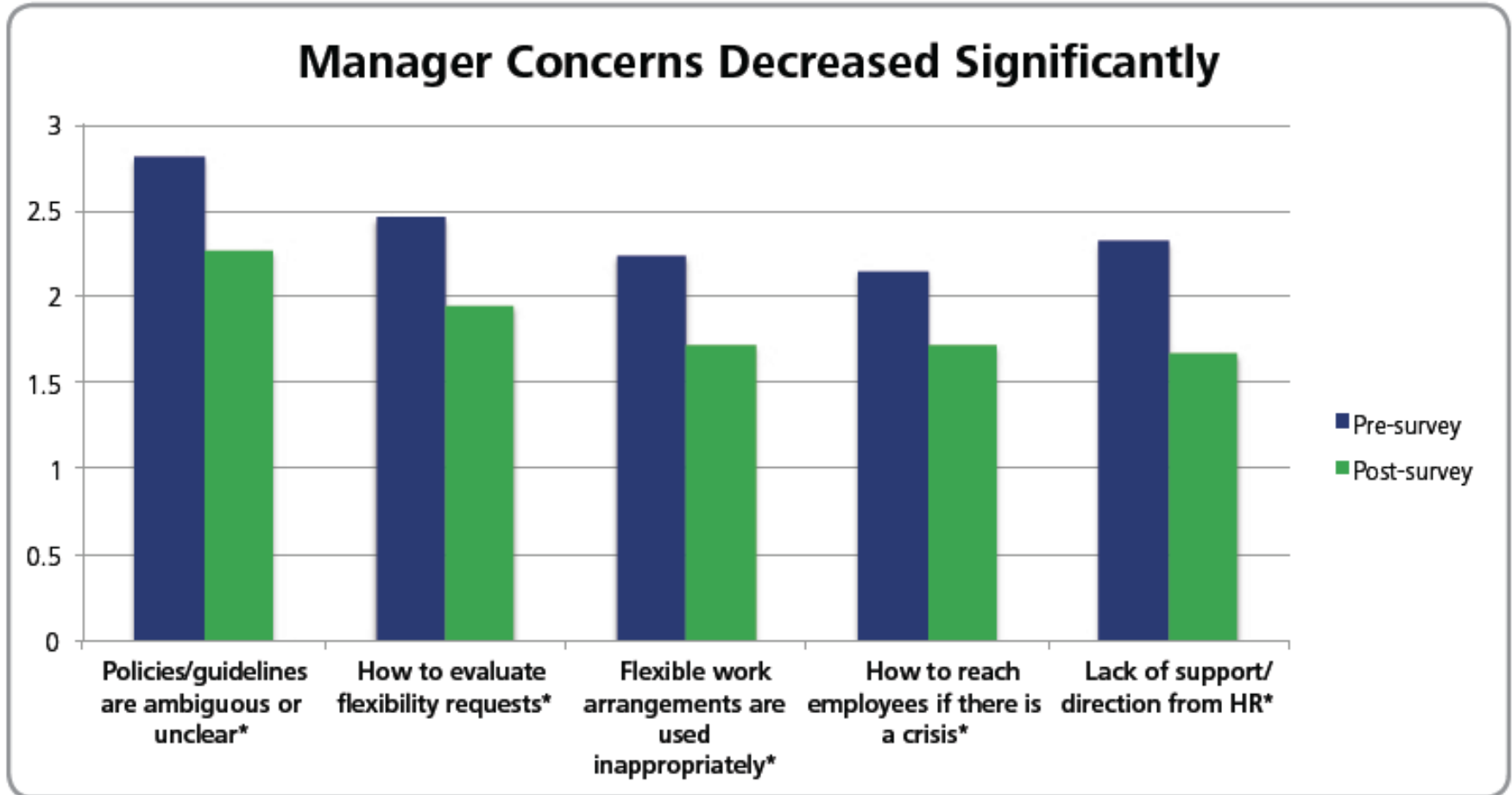
## Manager Experience with Flexible Work



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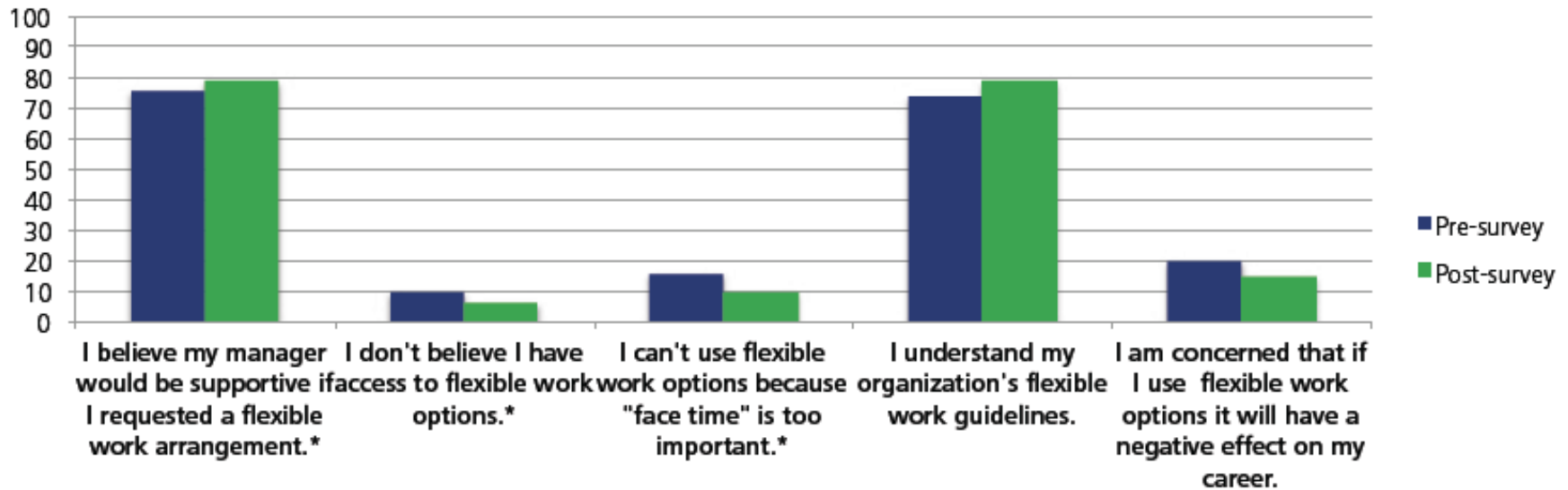


# Manager Concerns Decreased



# Employees' Perception of Flex Improved

## Employee Experience with Flexibility



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# The Culture Around Flex Improved



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# Manager and Team Outcomes

Video can be found here:

[Manager and team outcomes](#)



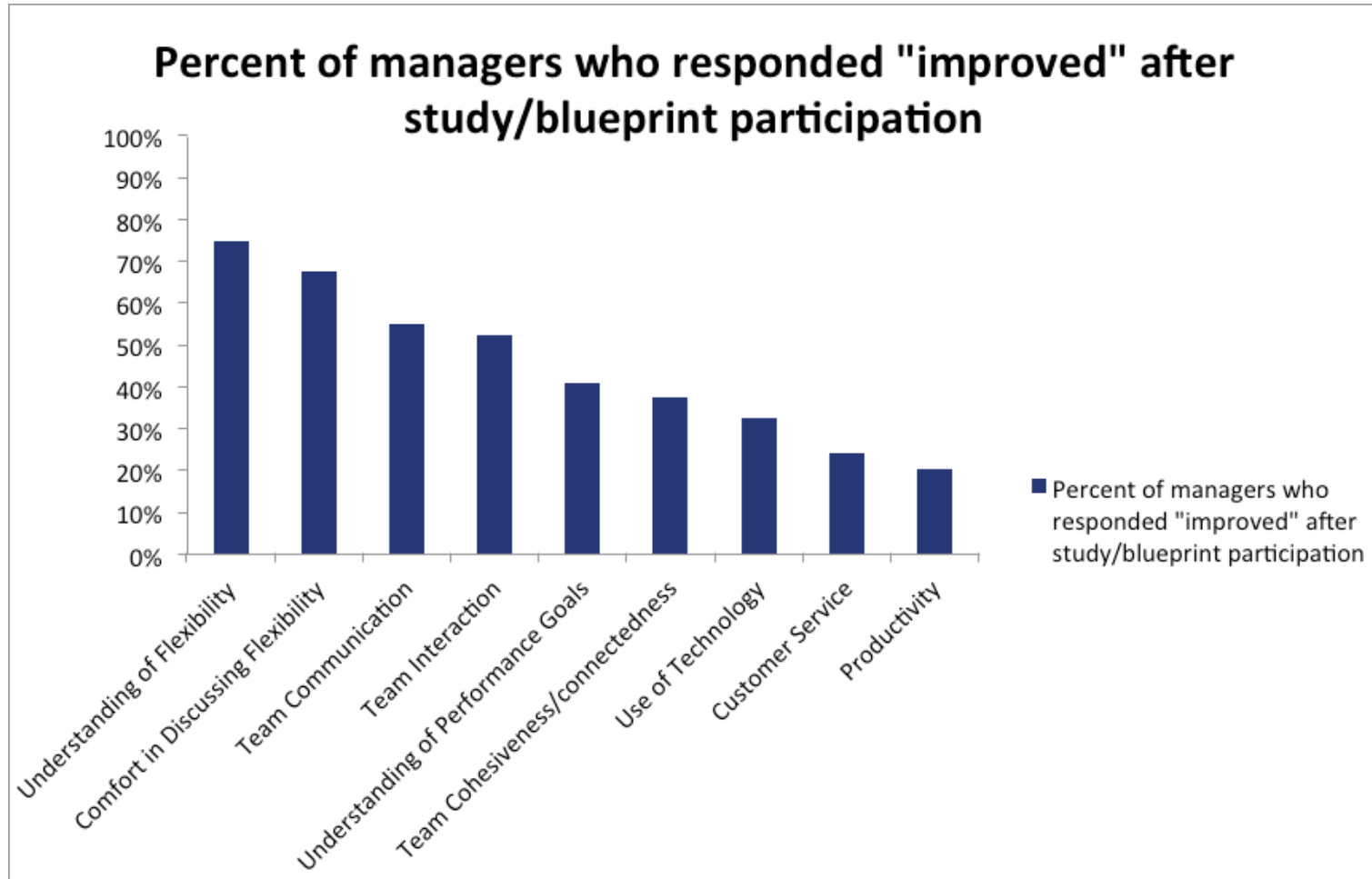
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# Overall Manager and Team Benefits



# Unexpected Benefits

Video can be found here:

[Surprises and unexpected benefits](#)



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## Quote from Delta Emerson, Chief of Staff, Ryan LLC

*“Regardless of how well-designed a company’s approach to workplace flexibility is, if managers aren’t on board and don’t have the skills to manage effectively, it will flounder.*

*It’s as simple as that this study is proof positive that it is possible to properly equip managers, even those who might be resistant, to succeed in leading a flexible team.”*



# Your Next Steps

- Assess the attitudes of managers in your organization
- Engage managers to build flex culture
- Invest in training and support activities
- Show managers how flex can help them improve performance
- Speak their language





# Questions

<http://workplaceflex.org>



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