

MAKING CHANGE

BEYOND FLEXIBILITY

Creating Champions for Work-Life
Effectiveness



About Catalyst

Founded in 1962, Catalyst is the leading nonprofit membership organization working globally with businesses and the professions to build inclusive workplaces and expand opportunities for women and business. With offices in the United States, Canada, and Europe, and the support of more than 370 member organizations, Catalyst is the premier resource for research, information, and trusted advice about women at work. Catalyst annually honors exemplary organizational initiatives that promote women's advancement with the Catalyst Award.

Catalyst's *Making Change* series is designed to give business leaders new perspectives on common workplace issues.

BEYOND FLEXIBILITY

Creating Champions for Work-Life Effectiveness

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3

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Beyond Flexibility—Creating Champions for Work-Life Effectiveness

In the last two decades, dramatic changes have redefined the workplace. In addition to globalization and new technologies, organizations now grapple to maintain long-term sustainability and success in economically turbulent times. Employees struggle to innovate and maintain quality and productivity in the face of increasing demands while sustaining meaningful lives at home and at work. At the same time, employees have become more diverse in work styles, values, perspectives, and experiences.¹ Their expectations of time at work, engagement in work, and career growth opportunities have evolved, requiring new value propositions for businesses that wish to remain employers of choice.

Catalyst has advised many global corporations and firms on how to shape work cultures that work for both employees and the workplace. Our counsel is based on a sophisticated workforce approach we call work-life effectiveness (WLE). WLE advances the historic

practice of flexibility from a request for “me” to an organizational tool for “us.” It simultaneously benefits employees and businesses by identifying pragmatic solutions that engender sustainable high performance and agility.

About This Series

This series of two publications describes Catalyst’s WLE approach, why it is good for businesses and employees, and how individuals can support WLE in their daily work. The first booklet, *Beyond Flexibility—Work-Life Effectiveness as an Organizational Tool for High Performance*, explains the framework and concepts of WLE and illustrates how organizations can incorporate it into their business strategies. This second publication highlights the critical role leaders play in creating a WLE culture and describes how they, along with managers, employees, and human resources practitioners, can become WLE champions. Both publications can be obtained through our website at www.catalyst.org.

1

1. Bureau of Labor Statistics, Current Population Survey, “Employed Persons by Detailed Occupation, Sex, Race, and Hispanic or Latino Ethnicity”; “Table 2: Employment Status of the Civilian Noninstitutional Population by Detailed Age, Sex, and Race, Annual Average 2006,” unpublished data, National Center for Education Statistics, Digest of Education Statistics, 2005.

Table 1: Beyond Flexibility—An Overview

<i>Beyond Flexibility—Work-Life Effectiveness as an Organizational Tool for High Performance</i>	<i>Beyond Flexibility—Creating Champions for Work-Life Effectiveness</i>
<p>What is WLE? What is the business case for WLE? How can organizations support WLE? How can organizations assess progress?</p>	<p>How does WLE sustain peak performance? How can leaders support WLE? How can managers support WLE? How can employees support WLE? How can HR support WLE?</p>

2

How Does WLE Sustain Peak Performance?

WLE challenges the status quo and focuses organizations and their people on the right work at the right time with the right talent. It is a tool businesses can use to actively manage people, enhance agility, fulfill priorities, scrutinize current processes, and drive mutually beneficial solutions. The results are better

business solutions and improved resilience, energy, and ingenuity of employees.² The examples below demonstrate how some organizations have used WLE to find solutions that work both for the business and employees.

Instituting process improvements. Employees at a large high-tech company needed to run many custom reports, often with only slightly different information.

2. Lori Muse, Stanley G. Harris, William F. Giles, and Hubert S. Field, “Work-Life Benefits and Positive Organizational Behavior: Is There a Connection?” *Journal of Organizational Behavior*, vol. 29, no. 2 (February 2008): p. 171-192.

Producing these reports was time-consuming and created a crisis-oriented work environment. Focusing on work and life effectiveness, the department head brought the team together to reduce the stress level in the group and simultaneously remain responsive.

The group identified patterns in the types of requests and was encouraged to experiment with process improvements. Employees coordinated across the team to allow individuals to better customize their work schedules, and the department head changed his management style so that he rewarded contributions rather than “face-time.” The result was a decrease in the number of reports run each month with no detectable loss in client satisfaction and dramatically more employee energy and effectiveness, which was later reflected by substantial increases in favorable employee opinion scores.

Responding to work cycles. Junior employees in a professional services firm, expected to bill an annual target of hours and accustomed to cycles

in their workload, put in long hours regardless of their workload at any particular point in time. Busy employees were required to work late to complete their projects, while those with less work felt compelled to stay until early evening hours in case work became available. Subsequently, they would stay late into the evening to work on last-minute assignments or eventually leave conscious of the need to bill even more hours on another day to make up for the loss.

Using a WLE approach, the firm analyzed workflow, the distribution of work within and across work groups, and sought to smooth out major ebbs and flows. In addition, the firm strongly emphasized WLE as a tool that all employees need and use, including more junior employees typically without dependent care responsibilities. The organization was able to substantially embed the work culture with WLE as a “way of life” and a tool all employees use to accomplish their work. Junior employees became far more satisfied, motivated, and likely to remain with the firm.

Reducing stress and burnout. Employees based in Asia working for a global financial services company struggled with the need to be on conference calls late into the evening on a regular basis. Little thought was given to timing in scheduling meetings and Asian employees reported very high levels of stress and burnout on an employee opinion survey. Using a WLE approach, the organization created telecommunications guidelines that greatly sensitized U.S. employees to the need to factor in global time zones, resulting in global calls scheduled for regularly rotating times. The Asian employees subsequently reported less work-life conflict due to fewer late evening calls. In addition, the option to reclaim some of their personal time by coming in to work later than usual on the day after a late conference call became a tool at their disposal.

Developing a back-up system. Employees in a staff department for a *Fortune* 25 corporation were expected to start work at 7:30 a.m. to be available for their clients, which were other departments across the organization. Nearby public schools started after 8:00 a.m., which challenged parents of school-

age children. The department introduced a flexibility policy that created a targeted approach for managing the rare early morning requests, thereby relaxing the requirement that employees be at work at 7:30 a.m. A professional in the department remarked:

The new approach has been so well received in the department. It's like this burden has been lifted and the employees feel so much freer to be who they are. I didn't realize how stressed out I have been trying to get in every morning at 7:30.

With WLE as their compass, these organizations have recognized the business issues, considered employee needs and priorities, identified pragmatic solutions, and put plans into action. But creating and implementing WLE plans requires people from all parts of an organization.

- Senior leaders set the tone and articulate the vision.
- Managers fuel WLE through their day-to-day management of teams and individuals.

- Employees become partners in identifying new ways of working.
- HR facilitates supporting efforts to create an agile work culture.

Each constituency is a piece of the puzzle that enables WLE to drive business results.

How Can Leaders Support WLE?

Voices From the Trenches: The Importance of Leadership Modeling³

- I think that as leaders in the organization, there needs to be a more explicit expectation that we're going to set the tone. We know ways that we each take time off. We know about each other's life interests. But, it's something we don't take time to tell others.
- Leaders should show that [flexibility] is okay. For them to do so, they must use actions in addition to words to make everyone understand. I think that is most important.
- The first thing my new boss said was that his family was the most important thing to him. Just hearing him say that took the edge off for everybody. We are all working so hard because we want to do more for him because he understands the variances in everyone's life.
- In my practice group there is immense pressure and lots of stress. It comes from someone walking the floor and seeing if you are still around, asking if you are busy and if you are, they ask how late you stayed last night.

5

3. Quotations come from Catalyst Advisory Service diversity engagements.

Leaders of an organization must be visible champions of the WLE approach if the organization is to successfully sustain high performance and agility through WLE. The symbolic role leaders play—defining the work culture through their behaviors—sends a strong message about the degree to which working and living effectively is acceptable. In fact, the most common piece of feedback Catalyst receives from managers in WLE trainings is the importance of explicit senior leadership messaging and modeling in legitimizing the use of WLE.

Many leaders have told us that they already use WLE in their daily lives by blocking out quiet times to write reports, holding off on completing assignments until all pieces are available, questioning deadlines, focusing on life as well as work priorities, finding time to sleep in the midst of global travel, and coordinating round-the-world meetings. When leaders share these and other approaches, their employees will start to consider WLE as well.

Leadership champions are open to and creative about the best way to meet business goals, transparent in their own approach to integrating their work and personal lives, and conscious of the language they and others use when talking about people working “differently.” Specific strategies leaders can use include:

Communicate your support

- Create a vision for what your future workplace will look like and articulate strategies and behaviors for realizing that vision.
- Clearly articulate big-picture priorities and help direct reports manage goals and set the stage for proactive changes within their departments.
- Reinforce the business case for creating an agile workplace based on the organization’s unique market and competitive realities.
- Identify and broadcast the opportunities and benefits of using WLE, as well as the threats and costs of remaining stagnant.
- Publicize success stories of individuals and teams using WLE.

- Change language regarding “good employees”; be wary of comments perpetuating a work “hero” as someone without boundaries regarding work.

Be transparent

- Be transparent with how you use WLE to stay resilient; share how you prioritize, set limits, refuel, and work for peak performance.
- Discuss ways that you have re-thought your own work and how your work-life cycles have shifted over the years.
- Talk about your personal life and interests in ways that are comfortable for you.

Take personal action

- Meet one-on-one with employees at various levels to discuss career objectives, aspirations, challenges, and work-life considerations.
- Discuss what work-life effectiveness means for each of your direct reports.
- Support process improvements to reduce costs and waste and increase productivity.

- Model flexible work practices that complement business cycles (e.g., when needed, push through tight schedules but when possible, schedule meetings during core hours, avoid weekend travel, and take time to refuel).
- Consider impact on work and life when prioritizing work.
- Evaluate what high performance means for employees and teams and support it accordingly.

Reward productive behaviors

- Recognize managers who support win-win solutions to work-life issues.
- Reward efforts to take a planned rather than a crisis approach to management.
- Reward risk-taking and nontraditional ideas, activities, and actions.
- Praise challenges to work practices that are now obsolete or inefficient.
- Acknowledge teams when they put in substantial extra time and effort to meet pressing priorities.

Diversity & Inclusion Practice

Dow Corning—Leaders and Managers Driving WLE

In 2003, an employee opinion survey revealed that Dow Corning employees were having difficulty integrating their work and personal lives. Beginning in 2004, with strong leadership from CEO Stephanie Burns, Dow Corning began to proactively increase flexibility within the work environment in order to support and retain employees. The executive leadership began to designate global no-meeting weeks that enable employees to focus on deliverables and outstanding work, as well as take vacations without the pressure of participating in meetings.

The introduction of compressed workweeks was another major feature of Dow Corning's flexibility expansion. Initially offered to targeted business units, compressed workweeks gained momentum as managers were encouraged to customize the program by unit. Compressed workweeks are in use even in work groups for which continuous coverage is a requirement. For instance, a customer service group that struggled with how to implement compressed workweeks has taken a thoughtful and experimental approach. To start, the group designated every fourth Friday as a day off for one-quarter of the group. This approach was highly successful and the group has since moved to a bi-weekly model, allowing employees to compress their schedules every other week.

Dow Corning discovered that colleagues in Asia, particularly China and Japan, had little interest in compressed workweeks. Instead, Asian employees were far more interested in minimizing frequent late-night conference calls. In response, Dow Corning rolled out teleconference guidelines so that employees working in Asia, Australia, New Zealand, South America, Europe, and the United States regularly rotate time zones for conference calls.

Managers are also encouraged to partner with employees. By crafting a customized schedule, employees are able to limit travel and reduce workloads without career penalties. Managers seek input from their employees regarding the support needed to manage work-life integration and they work to identify and implement feasible solutions. In order to ensure manager accountability, Dow Corning added the consideration of employee work-life issues as part of a manager's 2007 performance review form. Since the initiative began, satisfaction rates have trended upward. A recent survey of U.S. employees found that 76 percent feel encouraged to manage their work and personal lives and 90 percent can take time off work when they find it necessary.

How Can Managers Support WLE?

By virtue of their organizational positions, managers are aware of business direction and leadership priorities. They are under intense pressure to deliver results, often with limited resources and quickly shifting priorities. At the same time, managers are being asked by their employees for more flexibility and control over their schedules. Finally, many managers have great difficulty managing their own work-life demands. They, perhaps, can most benefit from WLE.

10

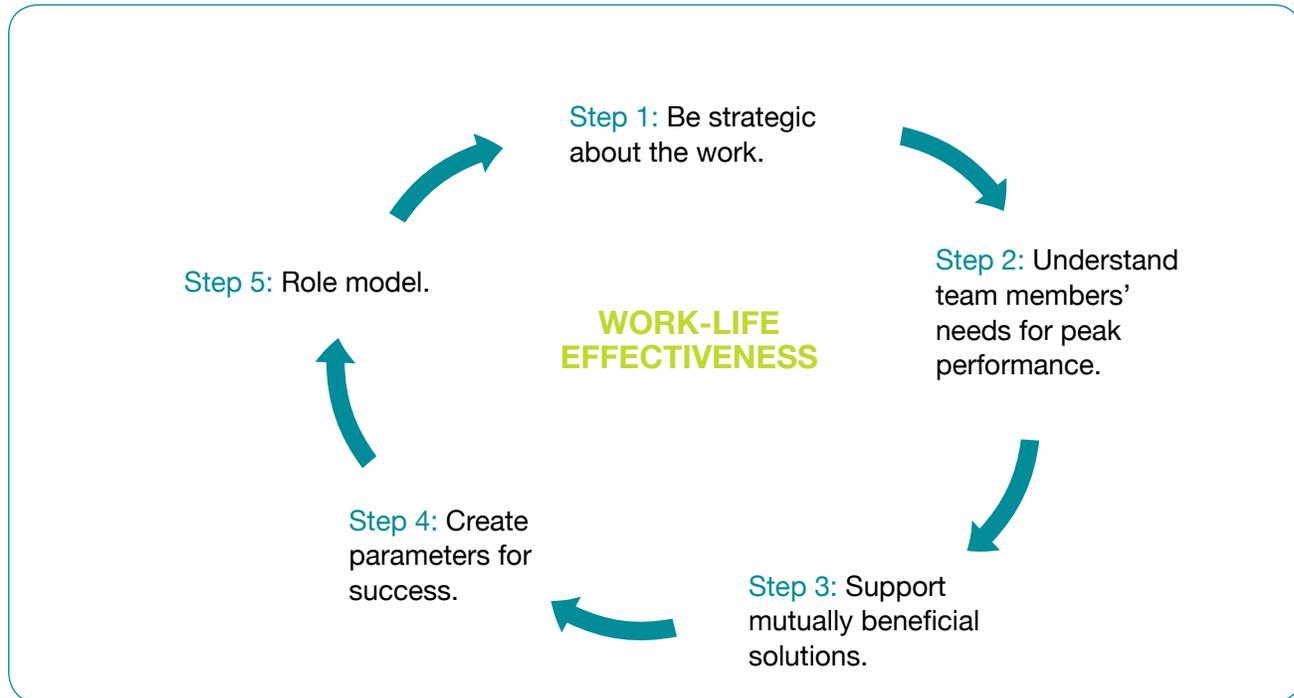
Through diversity assessments and work-life effectiveness workshops, many women and men have told Catalyst that contributing to business success is

very important to them. They also have told us that they are most effective when managers take them seriously as employees. Managers should provide advancement opportunities and rewards, support high performance and impact, and allow employees sufficient control over how they work. As documented by a substantial body of research, including a 2006 Catalyst study, managers have a direct impact on employees' intentions to stay in organizations and on employee productivity levels.⁴

Employees are looking for a partnership with their managers. Managers can create this partnership in support of WLE with the five steps described in Figure 1.

4. Nick Bloom, Tobias Kretschmer, and John Van Reenen, *Work-Life Balance, Management Practices And Productivity* (Anglo-German Foundation for the Study of Industrial Society, May 2006); Brad Harrington and Jacquelyn B. James, "The Standards of Excellence in Work-Life Integration: From Changing Policies to Changing Organizations" in Marcie Pitt-Catsouphes, Ellen Ernst Kossek, and Stephen Sweet, eds., *The Work and Family Handbook: Multi-Disciplinary Perspective and Approaches* (Mahwah: Lawrence Erlbaum, 2006): p. 665-684; Corporate Voices for Working Families, *Business Impacts of Flexibility: An Imperative for Expansion* (November 2005); Arvind Malhotra, Ann Majchrzak, and Benson Rosen, "Leading Virtual Teams," *Academy of Management Perspectives*, vol. 21, no.1 (February 2007): p. 60-70; Catalyst, *After-School Worries: Tough on Parents, Bad for Business* (2006): this study found that an understanding manager was the top workplace support in minimizing stress for parents worried about their children during after-school hours.

Figure 1: Five Steps Managers Can Take to Support WLE



Step 1: Be strategic about the work

- Always start with the work and what needs to be accomplished. Consider the track record and ability of the team to meet deliverables. Assess the current operations of the team and the sustainability of your approach.
 - Think about the big picture and current processes for delivering on priorities, effort invested in low- and high-priority work, workload and division of labor, quality of team work, and culture.
 - Articulate the necessary boundaries and norms that allow the team to function; for example, define core hours, coverage requirements, responsiveness requirements, and communication tools.
 - Ask what detracts from work effectiveness; rethink the work to improve productivity, innovation, service, and to reduce costs.
 - Pay attention to situations in which flexibility is already being used.

- Consider a variety of ways to sustain peak performance.
- See flexibility requests as catalysts to enhance the team's effectiveness.

Step 2: Understand team members' needs for peak performance

- Recognize that each employee has a unique life situation, career aspirations, and work style; what it takes for one person to be a high performer is different from what it takes for another.
 - Understand team members' strengths and what they need for peak performance; consider their energy, resilience, and sustainability needs.
 - Get to know employees as multi-faceted individuals and better understand their life context.
 - Encourage open dialogue about needs and ambitions that impact employee success in the long- and short-term.

Step 3: Support mutually beneficial solutions

- Find solutions that meet the needs of employees, the team, and the business utilizing information gleaned from the first and second steps. Focus on crafting the best solutions given real constraints and challenges.
 - Communicate openness to creativity, problem-solving, trial and error, and testing ideas.
 - Proactively seek input from employees about alternative ways of meeting team goals. Encourage employees to identify more effective ways of producing deliverables.
 - Evaluate the impact of solutions on the work and the team; revise solutions as needed.

Step 4: Create parameters for success

- Manage strategically, making sound decisions with new information and priorities and keeping employees apprised, in mind, and in line, as needed.

- Encourage personal and collective responsibility and accountability.
- Clearly state your expectations and provide guidelines for evaluating conflicting priorities.
- Monitor the functioning of the team, workload equity, the attainment of team goals, and the effectiveness of employees on all types of schedules.
- Manage up, across, and with both internal and external customers or clients to create realistic timetables for deliverables.

Step 5: Role model

- Value WLE as a useful approach to achieving high performance by modeling work-life integration in your own way.
 - Make discussion of workloads and work-life issues a regular part of staff meetings and talent management discussions.
 - Reward performance and efficiency rather than face-time.

- Reward direct reports who support WLE with recognition and compensation.
- Address disparaging comments made by your staff about other employees' use of informal or formal flexibility; showcase examples of success.
- Support and encourage various career advancement paths.
- In ways that are comfortable for you, talk about how you prioritize work and personal goals and how you refuel; share your experiences of integrating work-life priorities at different points throughout your career.
- Examine any personal biases regarding commitment, face-time, and flexibility. Seek to broaden your understanding and appreciation of different ways of working and career paths.

How Can Employees Support WLE?

Employees have a significant role to play in improving work-life effectiveness. In many ways, they are the experts with a keen understanding of what it takes to deliver on organizational priorities, and they possess an intimate knowledge of customer and client demands. Employees can often conceptualize better ways to produce deliverables. Employees contribute to the success of WLE by doing quality work, being personally accountable, and communicating their schedule and accessibility with back-up plans.

Employees can best add value to the organization if they are empowered to accomplish their work in ways that align with their lives. Employees need to state their work-life needs, understand their own work styles and what supports their best performance, know what is important to their managers and teams, and understand how they add value to the business. When employees are unable to create appropriate limits, when they are not proactive about their work, when they are inconsiderate of team members, and

when they do not support their managers' attempts to support WLE, they squelch the tremendous potential of WLE for the organization and themselves.

Indeed, WLE requires employees to be full partners in working with their managers to identify solutions. In our consulting work, Catalyst sees that employees can fail to understand the important role they play in making WLE a reality. Actions employees can take include:

As team members

- Participate in team discussions about what is working well and what could be done to improve the group's ability to work together and meet deliverables.
- Help identify feasible scenarios that support WLE.
- Be a strong communicator and coordinator.
- Support WLE among coworkers.
- Suggest creative solutions that increase efficiency.

- Avoid negative comments about flexibility; address colleagues who derail flexibility for others.
- Be a responsible and accountable member of the team.

As individuals

- Work smart: think about what it means to be effective at work, strive to be more efficient, rethink processes that aren't working, and develop alternate solutions.
- Proactively think about how requests for flexibility can be managed within the work group, seek input from colleagues, identify potential challenges, and propose solutions.
- Proactively manage individual workload and flexibility, assess how it is working, be flexible about flexibility, and make adjustments as necessary.
- Clearly communicate availability and ways to be reached in case of time-sensitive matters.
- Maintain strong performance regardless of when and where work happens.

How Can HR Support WLE?

The need for WLE is clearly and conclusively a workforce issue and, as such, should be a primary responsibility of human resources departments. After all, a prime motivator for introducing WLE is employees' need for flexibility across the career cycle. Yet there is often strong resistance to people working differently, coupled with an assumption that any changes will result in a net loss for the organization. HR practitioners are critical in reinforcing the business necessity of WLE and helping the organization reduce unproductive behaviors. The following actions will help HR practitioners support WLE.

Support managers

- Become a WLE expert. Focus on the transformative potential of WLE and not just the flexible work arrangement policies that may be your purview.
- Help managers to think of WLE as something that is not separate from management but a part of effectively managing employees so they can deliver the greatest value to the organization.

- Educate managers as to how to integrate WLE into staffing and business decisions.
- Partner with managers when presented with difficult decisions.
- Hold managers accountable for sustaining WLE by monitoring progress.

Reinforce the business case

- Help leaders and managers remember that WLE is a powerful, yet still underutilized, management tool that can impact employee commitment and satisfaction, morale, productivity, and overall performance.
- Educate employees, managers, and leadership about the value, importance, and necessity of WLE for sustainability.
- Be honest about the additional communication and collaboration WLE requires and be a resource to help teams operate more flexibly.
- Showcase success stories that resulted in improved productivity and engagement; help facilitate learning by highlighting examples that were less successful and communicating how they were adapted for improved results.

- Facilitate the sharing of best practices across the organization.
- Track WLE examples and understand results in terms of productivity, employee engagement, and recruitment and retention of talent.

Help employees

- Talk with employees to ensure that they feel empowered to speak up regarding their needs and that they do so with a focus on business and results.
- Where appropriate, be available to help employees develop proposals for alternate work arrangements that take into account personal, business, and team needs.

Develop work-improvement protocols and other tools

- Develop a process improvement approach and use it throughout your organization; facilitate team efforts to solve problems using a WLE approach.

- Provide employees and managers with tools to help them rethink the work, question work that does not make sense, and develop alternate solutions.

Lastly, the way we work now is quite different from the way we worked just ten years ago. HR practitioners should remind leaders that feeling comfortable in this very different work world, like any change, takes time and practice. While there are always naturals, most leaders—and whole organizations, in fact—need to learn how to use and champion WLE successfully. Through Catalyst’s advisory work, it is clear that comfort with WLE does grow through time.

In Summary

Catalyst sees the convergence of factors that make WLE an essential element of the 21st-century workplace. Leaders are charged with keeping organizations on track as they strive to be responsive to stakeholders, including consumers, investors, employees, and communities. Managers are under pressure to deliver results, often with limited resources and in environments where priorities can quickly shift. Employees receive mixed messages about using flexibility, and many struggle with the escalating pace of work demands. Leaders and employees are concerned about long-term sustainability.

Catalyst's WLE approach seeks to align the needs of the business and employees. It gives leaders, managers, employees, and HR practitioners the tools they need to step back and re-think workplace processes. With their knowledge and creativity, it is possible to ensure that high-priority work gets done while simultaneously enabling employees to be energized, focused, and engaged at work. With champions throughout the organization, WLE can drive peak performance, help retain talent, maintain competitive advantages, and increase organization and employee sustainability.

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