

# Balanced Workplace Flexibility:

## AVOIDING THE TRAPS

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*This article identifies three types of traps that can emerge when implementing workplace flexibility—altered work-life dynamics, reduced fairness perceptions, and weakened organizational culture—and provides core lessons for managers seeking a balanced flexibility approach. First managers must become flex savvy to understand the variation that exists in flexibility practices to align implementation with the workforce and organizational context. Second, implementing flexibility must not be treated as an accommodation but as a broader systemic organizational change empowering individuals and teams. The article provides a Work-smart case to highlight how to avoid traps and implement balanced workplace flexibility across multiple stakeholder interests. (Keywords: Women in Business, Work-Life/Work-Family, Flexibility, Workforce Diversity)*

**M**any employees, young and old, married and single, are reporting increasing pressures in effectively managing work and life responsibilities, reporting that work is increasingly “interfering with life.”<sup>1</sup> Further, current workforce competitiveness trends include an aging population and increasing elder care demands, dropping fertility rates with reduction of replacement workers to cover social security reserves, labor market shifts where women nearly equal men in participation, and a growth in dual career and single parent families.<sup>2</sup> Workplace flexibility policies have been seen as one solution to overcoming these challenges.<sup>3</sup> These work arrangements<sup>4</sup> adjust when, where, and how long employees work, providing managerial tools to attract, retain, and motivate talent. Global firms also are leveraging the increased portability of work allowing employees to work virtually anytime and anywhere. Flexible work programs, offered by employers for both work-life and performance reasons, are increasingly common. In 2012, for example, approximately three-fourths (77%) of U.S. employers allowed at least some employees to change the times they start/stop work and 63% allowed at least some employees to occasionally work from home.<sup>5</sup> Yet, organizations such as Yahoo and Best Buy have made headlines recently with their decisions to retract flexible workplace policies. Similarly, researchers have

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sometimes questioned the usefulness of flexibility for all employees.<sup>6</sup> On the one hand, managers may find it difficult to schedule meetings, meet performance objectives, and continually manage teams of virtual employees. On the other hand, some workers may feel that too much flexibility is a bad fit and may like a more structured work environment.<sup>7</sup>

It is critical for managers to understand and target the primary obstacles they are likely to face

in implementing workplace flexibility in order to successfully navigate to a more flexible 24-7 workplace. We have developed recommendations for organizations, managers, and employees in order to avoid potential pitfalls and to effectively implement flexibility initiatives. For more than a decade, members of our research team have worked to investigate flexibility, examining different types (e.g., part-time work, telecommuting, flex-time, and compressed work week) in varied settings (service and manufacturing, large firm and small) and across hierarchical levels and social classes (professionals and managers, middle-class union workers, and lower income employees). Drawing on our own work, along with a synthesis of key themes from prior research, we describe common traps in the enactment of workplace flexibility policies that underlie the current abandonment (or at least pulling back) of these initiatives by some organizations. We also offer two broad lessons to help managers avoid these problems and better access the potential rewards of flexibility. We develop guidance around two lessons. First, managers need literacy to select appropriate forms of flexibility and adapt them to the workforce, work processes, and organizational context. Second, effective workplace flexibility implementation changes organizations to empower individuals and teams, not as a one-time accommodation, but as a systemic initiative across multiple stakeholder interests.

## Flexibility Traps

Flexibility policies and practices are doomed to fail if the interests of all stakeholders—flexibility users, non-users, and the organization—are not respected and balanced in their implementation. We outline three common flexibility traps that flexibility initiatives face in implementation, each of which illustrates challenges from the perspective of one of these parties (see Table 1). First, we examine the potential for changes in work-life dynamics and unintended consequences for the flexibility user. Next, we consider potential negative equity and fairness effects of flexibility programs for coworkers and non-users of flexibility, and how this may also lead them to engage in backlash against flexibility programs and users. Last, we turn to potential broader effects of flexibility programs on organizational culture, where, as was the case at Yahoo, the presence of flexible work was perceived to undermine corporate culture. In gathering up these insights, we conclude that flexibility implementation must be “balanced,” or must consider and respect the needs and preferences of all interest groups that are differently affected by the policy.

**TABLE I.** Avoiding the Flexibility Traps

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<b>Altering Work-Life Dynamics</b>	<ul style="list-style-type: none"> <li>▪ Reduced contact between flexibility users and other organizational stakeholders</li> <li>▪ Difficulties transitioning</li> <li>▪ Difficulties managing careers and performance for flexibility users and their supervisors</li> </ul>
<b>Fairness (Inequality and Stigma)</b>	<ul style="list-style-type: none"> <li>▪ Job and Family Creep</li> <li>▪ Co-workers' perceptions of injustice/inequity and unequal distribution of flexibility access</li> <li>▪ Gatekeepers of flexibility seen as being arbitrary or unfair in awarding flexibility to employees</li> <li>▪ Lack of clarity on how nonusers should work with flexibility users</li> <li>▪ Potential for backlash and stigma</li> </ul>
<b>Culture of Unbalanced Flexibility</b>	<ul style="list-style-type: none"> <li>▪ Programs that do not fit will be perceived as less supportive and less useful</li> <li>▪ May lead to negative, rather than positive outcomes</li> <li>▪ Risk of extremes: from exploitation of workers (electronic tethering) to entitlement culture (inflexible flexibility)</li> </ul>

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Under balanced flexibility, the work of the organization to meet business/customer needs is carried out without harming the interests of the employer or employee or coworkers in the long term. To do otherwise, risks eventual resistance to flexibility initiatives and reduces their sustainability.

### ***The Altered Work-Life Relationships with Unintended Consequences Trap***

Flexible working arrangements can alter work-life relationships in ways that produce unintended consequences for users and that often go unaddressed. These include potential negative effects on social interaction, career prospects, and increased job and family spillover.

Research shows that flexible work arrangements generally have the effect of *reducing the amount of physical contact and interaction between co-workers* (both flex users and nonusers), between flexibility users and their supervisors, as well as with clients and the rest of the organization. It is for this reason that individuals in flexible work arrangements may feel isolated and distant from the social life of the firm. The important effects of this kind of separation were illustrated in a recent study of employees in two large high-tech firms. In this study, the researchers found that greater physical distance between flexibility users and other organization members reduced the amount that individuals working flexibly felt respected, and in turn made them feel less like full members of the organization.<sup>8</sup>

These feelings of *isolation* may lead some flexibility-users to also worry that by working differently they are damaging their career prospects. Researchers Joan Williams and Heather Boushey have pointed out that at times flexibility-users are wise to worry, and that by not being perceived as ideal, there can be career impairment.<sup>9</sup> Users of flexibility may report being left out of key meetings and having

promotion opportunities or pay increases disappear. In trying to be proactive and avoid negative career impacts, some individuals working flexibly compound their problems through over-zealous impression management efforts. A study of remote workers at an internet commerce firm showed that these workers' efforts to frequently update their supervisors about work accomplishments backfired and led to lower performance evaluations, perhaps because this contact was counter to the culture and norms in the workplace or created additional work for the supervisor. At the same time, staying in touch in a social manner, even using ingratiation, was more effective.<sup>10</sup> However, when communication is mainly done by e-mail, it is easy for the nonusers of flexibility to ignore the detailed e-mails of remote workers or view them as annoying, overly demanding, and one-sided.<sup>11</sup>

The changing relationships between flexibility users and the rest of the organization can create extra challenges related to *managing the careers and performance* of flexibility users. Managers may be unsure how to support, monitor, and elicit performance from virtual workers. Research shows, for example, that, while managers should not demonstrate lower trust by monitoring flexibility-users more closely or by checking up on their time management more often than is typical for non-flexibility users, managers should keep in contact with their flexibility users and work to maintain social connections.<sup>12</sup> In addition, Leslie and colleagues found that managers often make attributions as to the motives for employees' use of flexible policies, which impacts how they treat the employees. Specifically, managers who perceive employees' use of a flexibility program for productivity reasons interpreted this as high commitment resulting in career premiums for these employees. Alternatively, managers who perceived employees' use of flexibility as related to personal or life reasons interpreted this as low commitment leading to negative consequences for the employees.<sup>13</sup>

Flexibility can sometimes also change work-life relationships *to increase job or family creep*. Job creep refers to the intrusion of the job role into the home domain at times the employee or family would prefer it would not. Family or personal life creep occurs when personal communications and responsibilities seep into the work domain at times that the employee or colleagues might prefer separation. For example, one study found that employees who integrated work and family due to their "dual centrality," or high identification with both work and family roles, had higher frequency of work-to-family and family-to-work interruptions and lower boundary control. These employees viewed themselves as "reactors," constantly responding to interruptions from work to personal life and personal life to work. They reported higher depressive symptoms, lower schedule adequacy and work-life fit.<sup>14</sup> Another study found that heavier users of work-life flexibility supports actually experienced *increased* work-family conflict. These employees were more heavily engaged in domestic life and multi-tasking by watching children while trying to simultaneously keep up with work e-mail and calls.<sup>15</sup>

### ***The Fairness Trap***

The second type of trap relates to fairness, such as inequality and uneven distribution of flexibility access (for nonusers) and to the possibility (rightly or wrongly) of nonusers engaging in backlash. Many organizations have distributed

flexibility options unevenly creating “haves” and “have-nots” by allowing unequal access to workplace flexibility. For example, non-users of flexibility may be affected by the presence of a flexibility policy in several ways: there may be *equity or fairness* concerns regarding the allocation of access to flexible work arrangements in the firm, and the fact that some individuals are working flexibly may alter the work environment, or workload of those who are non-users of the policy.

Supervisors often serve as *gatekeepers*, deciding whether or not individuals have access to telecommuting.<sup>16</sup> If the decisions of these supervisors appear arbitrary or do not afford all workers access to some form of work-life flexibility, resentments and perceptions of unfairness may be damaging to workplace relationships. It is common, for example, for managers to think that flexibility is only for employees with visible family demands, or the superstar employees, or the employees who have jobs that are less core or central to business needs.<sup>17</sup> Taking a case-by-case need-based approach to flexibility access can create conflict among employees who want flexibility but do not appear to “need” the arrangement as much as others. Family can mean different things for different people. Both elder care and child care are becoming more recognized as legitimate demands on employee time that can conflict with work obligations.<sup>18</sup> Yet many nonwork obligations can extend beyond the traditional family dynamics. For example, time to see and care for one’s pet can also be viewed as a form of social support for growing numbers of employees. In reality, a majority of employees today want “a life outside work.” Managers should not let an employee’s family status factor into the decision-making process when considering whether to offer workplace flexibility to employees. Otherwise, they are creating flex backlash. Research shows there can be a flexibility stigma, especially if flexibility is seen as favoring those only with visible family and caregiving concerns over other groups.<sup>19</sup>

Becoming a flexibility “user” is something people want at any life stage, not just when (or if) they have young children. For example, Marriott implemented a flexibility program with a focus on retaining the mature hourly employees in their workforce.<sup>20</sup> Similarly, CVS Caremark implemented their Snowbird program in an effort to accommodate older workers.<sup>21</sup> By understanding the needs of a particular group, these companies were able to design programs that addressed the needs of older workers, retaining employees with unique and valuable skills.

In addition to tensions that may emerge regarding who is granted access to flexible work programs, *non-flexibility users may feel that their own jobs and relationships worsen* because their colleagues are working flexibly. For example, one recent study of professionals working in a high-tech company with a growing telecommuting program found that non-teleworkers were less satisfied and more likely to quit their jobs if they had to work with more individuals who were telecommuting.<sup>22</sup> This researcher surmised that these problems arose because the non-teleworkers’ jobs became harder as they were more available than teleworkers for last minute tasks, less flexible because they had to schedule meetings around the rare availability of teleworking colleagues, and less enjoyable because interactions with colleagues were more reliant on formal interactions and e-mail rather than face-to-face meetings. Similarly, in one telework study that surveyed supervisors and their direct reports (both flexibility users and non-users), we found that co-workers resent any apparent

favoritism by supervisors and any appearance that work is being transferred to them because of the flexibility-user's work arrangement.<sup>23</sup> A recent review of academic research on telecommuting shows that flexibility does not always have a negative impact on co-worker relationships, however, and these effects depend on the type of flexibility program and how it is implemented.<sup>24</sup>

### *Culture of Unbalanced Flexibility Trap*

Both popular and scholarly writers who consider links between flexible work arrangements and culture focus on the need to create a culture that is “supportive” or that encourages and enables individuals to take advantage of flexibility policies that are available to them.<sup>25</sup> It is clear that employees will not feel free to use flexibility policies if they feel the programs are inconsistent or unbalanced with work norms, likely to damage career prospects, or in subtle (or not so subtle) ways discouraged by supervisors.<sup>26</sup> The experience at companies such as Yahoo, where remote work was identified as undermining collaboration among staff and the corporate culture, points to potential problems that may arise when the presence of flexibility policies alters an existing corporate culture. The wrong type of flexibility program—one that is not a good fit for the type of work that is done and for the organization overall—may end up benefitting overstressed staff who prefer to reduce hours or work from home, but may sacrifice performance and the organization's interests. Such programs will not be sustainable, particularly in times of economic stress for firms.

Thus, flexible work arrangements can undermine culture if they are viewed as too one-sided in the social exchange of the employment relationship, either in favor of employees or employers.<sup>27</sup> For example, in one firm we studied with a high face-time culture, IT workers were expected to attend virtual meetings overseas during times they would normally be sleeping, and yet were still expected at work the next morning. In another study we conducted, the organization's approach to flexibility was imbalanced as the workers viewed working at home as an entitlement and managers did not feel they had the authority to adjust personal plans to help meet the employer's business needs, even during peak emergency periods.<sup>28</sup>

In sum, although workplace flexibility is desired by many of us for the possibilities it offers to better juggle our busy home and work lives, it can become a trap and create new problems for individuals, colleagues, and firms. There are two lessons from our research about how to avoid these traps and develop a balanced approach to flexibility that works for all these stakeholders: learning to design sensible flexibility options for your firm; and approaching flexibility as a change initiative targeting empowerment for individuals and teams in the firm to self-manage work-life and results-oriented work.

## **Flexibility Lesson 1: Become “Flex-Savvy” to ensure sensible design across types.**

The first step in successful implementation of a balanced flexibility policy is for managers to become savvy about the different types of flexibility options. Becoming informed of best practices and implementation challenges will reduce the likelihood of falling into the traps. Choosing the program that best fits the



organization and its employees will pave the way for a smooth transition for new flexibility users, helping minimize changes in work and social dynamics between users and other organizational stakeholders. Similarly, this will lessen negative effects for nonusers by improving their ability to work with flexibility users. Finally, by providing flexibility solutions that work on a whole-systems level, organizations can begin to create a balanced flexibility culture.

As shown in Table 2, there are four broad categories of workplace flexibility: time, location/connectivity, amount of work, and continuity/time off.<sup>29</sup> For each of these types, we give an example of how they relate to flexibility traps. Table 3 provides examples of the pros and cons of these different types of flexibility options for various occupations or jobs.

*Flexibility in time* allows employees to choose (to some extent) how their total weekly work hours are allocated relative to a traditional work schedule. Examples include flextime (with a core band of time around which employees are expected to work an expected number of hours), compressed work weeks (e.g., 9/80 schedule), flexible shifts, and part-year/seasonal work. Flexibility in time means employees may not overlap in the times of day they are available for work tasks. Some employees may find there is a social stigma attached to flexibility in time from flex nonusers. This policy trap can make it difficult for employees to work effectively with flex nonusers (e.g., schedule meetings, work on projects). One example involves a former employee of a company that had won awards for innovating in reducing workloads for professionals. She tells the story of feeling marginalized by other colleagues who frequently made comments about her “leaving early.” She worked reduced hours from 6 a.m. to 2 p.m. after the birth of her child, accompanied by a comparable pay cut. When she re-adjusted her schedule to work 9 a.m. to 5 p.m.—working the same number of hours—the negative and resentful comments stopped as she was now leaving work at the same time as her coworkers. While this decreased her individual productivity, as she was getting more work done during the quiet morning hours, she reduced coworker resentment by being more socially visible during key face-time hours at work.<sup>30</sup>

Employees are attracted to jobs offering flexibility in time because of the expanded availability to meet work and nonwork obligations. Employees are better able to focus on job tasks without worrying about how to manage both work and nonwork demands that overlap. Employers also frequently benefit from flexibility in time policies with increased availability of employees for clients. Organizations can support globalization efforts by becoming more 24/7 and accessible to customer needs around the world and across time zones.

As an example, law enforcement officers typically work a traditional 40-hour work week of five days of 8-hour shifts, followed by two days off. An increasing number of agencies have begun using compressed work week schedules to improve effectiveness where officers work four 10-hour shifts per week or three 12-hour shifts. In a recent randomized experiment of compressed work week schedules in law enforcement, the Police Foundation found several advantages to 10-hour shifts, such as less overtime work and increased sleep per night for officers, as compared to the traditional 8-hour shifts. Yet these schedules do have some drawbacks for some

**TABLE 2.** Benefits and Challenges of Various Types of Workplace Flexibility (continued on next page)

Types of Flexibility	Benefits		Challenges	
	Employee	Organization	Employee	Organization
<b>Time Schedules</b>				
Flextime	<ul style="list-style-type: none"> <li>Increased availability for demands during regular work hours</li> <li>Greater perceptions of control</li> </ul>	<ul style="list-style-type: none"> <li>Reduced overtime</li> <li>Less absenteeism</li> </ul>	<ul style="list-style-type: none"> <li>May not be able to meet all nonwork responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>Synchronizing employee schedules</li> <li>Aligning schedules with clients' needs</li> <li>Implementation costs</li> </ul>
Compressed Workweeks	<ul style="list-style-type: none"> <li>Increased availability for demands during regular work hours</li> <li>More days "off" per period</li> </ul>	<ul style="list-style-type: none"> <li>Less overhead costs</li> </ul>	<ul style="list-style-type: none"> <li>Not always "flexible" (degree of choice in day off)</li> <li>Longer work days can lead to burnout</li> </ul>	<ul style="list-style-type: none"> <li>Coordinating employee schedules</li> <li>Clients' needs</li> <li>Implementation costs</li> </ul>
Flex Shiftwork/ Workday Schedules	<ul style="list-style-type: none"> <li>Can be available during "traditional" work hours for other demands</li> </ul>	<ul style="list-style-type: none"> <li>Can expand availability to clients</li> <li>Can increase hours of productivity</li> </ul>	<ul style="list-style-type: none"> <li>Fatigue</li> <li>Metabolic and Cardiovascular Disorders</li> <li>Work-family Conflict</li> </ul>	<ul style="list-style-type: none"> <li>Accidents and Injuries</li> <li>Difficult to assign all shifts</li> </ul>
Self-Scheduled Breaks	<ul style="list-style-type: none"> <li>Greater control over schedule</li> </ul>	<ul style="list-style-type: none"> <li>Employees may be more productive</li> </ul>	<ul style="list-style-type: none"> <li>Coworkers may want the same breaks</li> </ul>	<ul style="list-style-type: none"> <li>Coverage needs still must be met</li> </ul>
Part Year/Seasonal	<ul style="list-style-type: none"> <li>Employees are able to work less during slower times of the year</li> </ul>	<ul style="list-style-type: none"> <li>Organizations are able to hire from a larger pool of candidates</li> </ul>	<ul style="list-style-type: none"> <li>Working less than a full year may result in lower compensation</li> </ul>	<ul style="list-style-type: none"> <li>More paperwork because of hiring people every year or season</li> </ul>
Weekend/ Evening/ Night Work	<ul style="list-style-type: none"> <li>Employees can better manage their nonwork responsibilities, or work a second job</li> </ul>	<ul style="list-style-type: none"> <li>Organizations needing 24/7 coverage have a greater pool of candidates</li> </ul>	<ul style="list-style-type: none"> <li>Dependent care may be more difficult to find in the evenings or nights</li> </ul>	<ul style="list-style-type: none"> <li>Managers who work during the days may not be available to supervise evening or night employees</li> </ul>



**TABLE 2.** Benefits and Challenges of Various Types of Workplace Flexibility (continued from previous page, continued on next page)

Types of Flexibility	Benefits		Challenges	
	Employee	Organization	Employee	Organization
<b>Place</b>				
Telework; Home Based	<ul style="list-style-type: none"> <li>Can live farther from central work site</li> <li>Reduces commute to/from work</li> <li>Comfort/clothing</li> </ul>	<ul style="list-style-type: none"> <li>Less overhead costs at central work site</li> <li>Can attract/retain employees who live away from main work site</li> </ul>	<ul style="list-style-type: none"> <li>Communicating with colleagues/supervisor</li> <li>May not have flexibility in time</li> <li>Pressure to be available during standard work hours (visibility/face time)</li> </ul>	<ul style="list-style-type: none"> <li>Facilitating communication</li> <li>Not all work can be taken off site</li> <li>Typically requires providing employee with technology</li> </ul>
Remote Work	<ul style="list-style-type: none"> <li>Can live great distance from central work site</li> </ul>	<ul style="list-style-type: none"> <li>Enlarges pool of workers</li> <li>Employees can be located closer to customers</li> </ul>	<ul style="list-style-type: none"> <li>Communicating with colleagues/supervisor</li> </ul>	<ul style="list-style-type: none"> <li>Facilitating communication and long-term goals</li> <li>Typically requires providing employee with technology</li> </ul>
Hoteling	<ul style="list-style-type: none"> <li>Indirectly, the real estate cost savings benefits all employees</li> </ul>	<ul style="list-style-type: none"> <li>Reduces office costs</li> </ul>	<ul style="list-style-type: none"> <li>Feelings of isolation when removed from team members</li> </ul>	<ul style="list-style-type: none"> <li>Can be difficult to coordinate teams/foster commitment</li> </ul>
<b>Amount of Work</b>				
Job Sharing	<ul style="list-style-type: none"> <li>Lower role overload</li> <li>Less work-family conflict</li> </ul>	<ul style="list-style-type: none"> <li>Can retain trained/quality employees who otherwise could not maintain workload</li> </ul>	<ul style="list-style-type: none"> <li>Role identification may be unclear</li> <li>Each employee is dependent on the other</li> </ul>	<ul style="list-style-type: none"> <li>Increased expenses resulting from number of employees (e.g., benefits)</li> </ul>
Reduced Load or Customized Work/Part Time Work	<ul style="list-style-type: none"> <li>Less work-family conflict</li> </ul>	<ul style="list-style-type: none"> <li>Reduced turnover costs</li> <li>Can retain trained/quality employees who otherwise could not maintain workload</li> <li>Reduced turnover costs</li> </ul>	<ul style="list-style-type: none"> <li>Decrease in compensation</li> <li>Need to be careful not to try to do full time work load in fewer hours</li> </ul>	<ul style="list-style-type: none"> <li>More employees to manage and possibly higher overall benefits expenses</li> </ul>
<b>Continuity of Work</b>	<ul style="list-style-type: none"> <li>Less chance of burnout; opportunity to reenergize</li> </ul>	<ul style="list-style-type: none"> <li>Long term retention of quality employees</li> </ul>	<ul style="list-style-type: none"> <li>Loss of pay for a period of time.</li> </ul>	<ul style="list-style-type: none"> <li>Work must be covered while employee is on break</li> </ul>

(continued)

**TABLE 2.** Benefits and Challenges of Various Types of Workplace Flexibility (continued from previous page)

Types of Flexibility	Benefits		Challenges	
	Employee	Organization	Employee	Organization
FMLA	<ul style="list-style-type: none"> <li>▪ Able to attend to self or family member who is ill</li> </ul>	<ul style="list-style-type: none"> <li>▪ Retention of employees who might otherwise leave the organization</li> </ul>	<ul style="list-style-type: none"> <li>▪ Compensation impacts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Work must be covered while employee is taking leave</li> </ul>
Comp Time	<ul style="list-style-type: none"> <li>▪ Extra time off in exchange for working extra hours when needed</li> </ul>	<ul style="list-style-type: none"> <li>▪ No additional financial repercussions, while having employees work extra hours when needed</li> </ul>	<ul style="list-style-type: none"> <li>▪ If employee continues to be very busy, they may not get to use their comp time.</li> </ul>	<ul style="list-style-type: none"> <li>▪ At some point, employees will use comp time and therefore not be working</li> </ul>

Note: Numerous forms of workplace flexibility exist, which can be modified or used in combination to fit the needs of an organization and its employees. This table lists each of the most common forms of workplace flexibility and identifies the unique advantages and disadvantages of each of the various types. Each type of policy is also grouped with similar types of flexibility to identify policies which offer flexibility in time, place, amount, and continuity of work and the relative benefits and challenges of each. This table is adapted with new updated content from E. Kossek and J. Michel, "Flexible Work Scheduling," in Sheldon Zedeck, ed., *Handbook of Industrial and Organizational Psychology* (Washington, D.C.: American Psychological Association, 2001), pp. 535-572.

**TABLE 3.** Productivity Benefits and Primary Obstacles across Types of Flexibility

Types of Flexibility	Productivity Benefits	Primary Obstacles	Most Likely To Succeed	Example Occupational Domains	Companies Who Use This
<b>Time Schedules</b>	<ul style="list-style-type: none"> <li>▪ Can expand availability to clients</li> <li>▪ Reduced absenteeism and accidents from nonwork distractions</li> </ul>	<ul style="list-style-type: none"> <li>▪ Some jobs can only be done at certain times (do not allow for schedule adjustments or choice)</li> <li>▪ May find difficulty in scheduling whole-group meetings.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Office-based or other jobs that allow for schedule adjustments</li> <li>▪ Shiftwork that can allow employees to choose some shifts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Engineer</li> <li>▪ Factory worker</li> <li>▪ Nurse</li> <li>▪ Police officer</li> </ul>	<ul style="list-style-type: none"> <li>▪ Marriott<sup>a</sup></li> </ul>
<b>Place</b>	<ul style="list-style-type: none"> <li>▪ Reduced facility and operating costs</li> <li>▪ Can expand geographic markets, attracting talent and clients in new areas</li> </ul>	<ul style="list-style-type: none"> <li>▪ Some jobs can only be completed at the central work site</li> <li>▪ Increased costs of technology and equipment for communicating among team members</li> </ul>	<ul style="list-style-type: none"> <li>▪ Professional or academic work that can be conducted from most locations</li> <li>▪ Jobs that do not require on-site physical labor or emergency response</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sales manager</li> <li>▪ Researcher</li> <li>▪ Writer</li> </ul>	<ul style="list-style-type: none"> <li>▪ Hewlett-Packard<sup>b</sup></li> </ul>
<b>Amount of Work</b>	<ul style="list-style-type: none"> <li>▪ Can retain highly qualified employees who might otherwise have to leave</li> <li>▪ Can reduce costs associated with benefits for full-time employees</li> </ul>	<ul style="list-style-type: none"> <li>▪ Can be problematic to fully cover all projects/tasks</li> <li>▪ Not ideal for projects/tasks with large overlap across organization</li> </ul>	<ul style="list-style-type: none"> <li>▪ Large organizations that can afford to take on the expense of increased numbers in their workforce</li> </ul>	<ul style="list-style-type: none"> <li>▪ Advertising consultant</li> <li>▪ Factory worker</li> <li>▪ Bank teller</li> </ul>	<ul style="list-style-type: none"> <li>▪ KPMG<sup>c</sup></li> </ul>
<b>Continuity of Work</b>	<ul style="list-style-type: none"> <li>▪ Can retain highly qualified employees who might otherwise have to leave</li> <li>▪ May be particularly ideal for specialized or short-term projects</li> </ul>	<ul style="list-style-type: none"> <li>▪ Can be problematic to fully cover all projects/tasks</li> <li>▪ May not be ideal for long-term projects or facilitating relationships with clients</li> </ul>	<ul style="list-style-type: none"> <li>▪ Large organizations that can afford to take on the expense of increased numbers in their workforce</li> </ul>	<ul style="list-style-type: none"> <li>▪ Teacher</li> <li>▪ Project manager</li> </ul>	<ul style="list-style-type: none"> <li>▪ Central Baptist Hospital<sup>d</sup></li> </ul>

This table describes the advantages and obstacles of implementing each type of workplace flexibility, across types. It identifies how and when each type might be most effective.

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d. The Sloan Center on Aging & Work, op. cit.

jobs. The study found some disadvantages related to the 12-hour shifts, such as reduced alertness on the job compared to the traditional schedule.<sup>31</sup>

*Flexibility in location* (or “*flexplace*”) policies allow employees to choose where they conduct their work relative to the main work site. This allows employees to work away from the main work site, supported by electronic resources, for some or all of their work-week. Examples include telework, remote work, and hoteling (employers assigning office space on an as-needed basis to employees who ordinarily work offsite).

Some of the traps most commonly associated with flexibility in location policies include increased perceptions of isolation and an unsupportive workplace culture. Coworkers and clients may be reluctant to reach out to or call colleagues at home. Similarly, flex nonusers may feel unable to work remotely on projects with flexplace users as they may prefer face-to-face interaction.

One of the primary reasons employees seek flexplace policies is because they allow employees to work and/or live away from the central work site. For example, teleworking permits employees to regularly avoid lengthy commutes to and from work and supports working in an area of the country (or world) other than where the organization is located. Employers can increase their talent pool by offering flexplace policies that allow for retaining capable individuals who otherwise would not be able to work at the organization.

Dell uses virtual call centers to allow full-time employees to work from home. After conducting benchmark assessments, Dell executed a 6-month pilot program, launching additional call centers at sites across North America. By expanding slowly, the company was able to capitalize on the program by taking advantage of pockets of labor sources as well as retaining quality employees whose life changes would have otherwise forced them to leave. Benefits from this program include enhanced productivity and reduced facility and real estate costs. Dell’s initiative changed the way the company thinks about how work gets done, allowing Dell to grow and keep talented employees using a balanced cultural approach to flexibility implementation.<sup>32</sup>

Flexplace policies sometimes also include flexibility in time policies. In other words, employees may have the ability to change the start/stop times of their workdays while also choosing their work location. However, not all flexplace policies allow for this; some telework policies require employees working from home to follow a traditional work schedule (e.g., 8 a.m. to 5 p.m.). Supervisors often prefer to physically oversee employees’ work. Without the ability to meet face-to-face, confusion and mismanagement of both flexibility in time and flexplace policies can occur.

Not all managers may have the leadership skills to motivate and supervise employees who work away from the central work site for some or most of their hours. Employees who are “out-of-sight” may be “out-of-mind.” It is important for managers and employees to understand expectations about policy use and how these systems relate to performance management. This can be further complicated when coordinating employees in interdependent work teams who can

modify their schedules as well as their place of work. Organizations should identify what resources employees and managers need to be successful when designing and implementing flexibility policies to overcome new unintended consequences from changing work-life dynamics trap.

For example, for employees who telework from home full time, Eli Lilly provides technology support and office equipment as well as training with their supervisors specifying how things such as communication, performance management, team meetings, core hours, and other important organizational factors will be handled. The company identified that support from leadership, assistance from IT, and an effective training program were all important factors that facilitated the success of the program. One of the primary indicators used to gauge success is the enrollment in the program, which Eli Lilly reports has doubled in the last five years.<sup>33</sup>

*Amount of work* policies involve employees engaging in part-time work, reduced-load, and job-sharing. This type of policy helps employees avoid repeating conflicts between work and outside obligations by altering the employee's workload to meet both parties' needs. This lets employees retain their employment (and related benefits) and still be highly involved in nonwork demands. Examples include parents, students, caregivers, as well as those with religious, military, physical therapy, sports, or volunteer commitments.

In one firm with reduced-load work, the organization viewed the arrangement as an idiosyncratic deal and did not adjust workplace systems to support broader change. Problems arose when two employees in a job share found out that only one could be promoted. As a result, the job share broke up and the individual who wasn't promoted felt stigmatized and eventually left the company.<sup>34</sup>

*Continuity of work* flexibility allows employees to modify their work arrangement or even their career trajectories in order to accommodate temporary events or challenges outside of work (e.g., death in the family, illness, and personal time). Continuity of work policies include sabbaticals, the FMLA, vacation/sick time, and career flexibility, enabling employees to maintain employment while also managing family or other life demands. This can reduce challenges such as burnout and conflict associated with having to simultaneously manage work and life roles. Both amount of work and continuity of work policies allow organizations to keep quality, experienced employees while enabling employees to retain their jobs. Organizations experience benefits through reduced costs associated with turnover and training.

As a spin-off of AT&T, Alcatel-Lucent adopted the original company's policy of allowing employees to regularly work fewer hours than a standard work week, provided their workload and the business needs are met. Originally designed to help the company become more 24/7, this policy is now an important HR tool for attracting and retaining employees who have nonwork obligations. This policy is also used to support projects that require specialized skills. Some of the primary benefits of the program's success include improved productivity, reduced absenteeism, and increased employee retention.<sup>35</sup>

Users of flexibility in amount of work or continuity of work policies may experience unsupportive workplace cultures as well as negative effects from non-users. Coworkers may feel they have to pick up the slack when other employees work a reduced load and are therefore less supportive of their colleagues. Even when work is equitably allocated, there may be perceptions of injustice in the way the work is distributed or workers may face potential backlash and may not be promoted due to a perceived lack of commitment to the job.<sup>36</sup> Some large organizations and occupations have a culture of overwork, so reduced work or part-time is viewed as unprofessional. This flexibility stigma for workers who want or are presumed to need flexible work arrangements for family demands has been found to be highly prevalent in STEM (Science, Technology, Engineering, and Math) fields.<sup>37</sup> When flexibility use is stigmatized, even when workers use available arrangements, they may still report lower well-being. Unsupportive cultures can lead to unbalanced flexibility as employees may be hired as part-time or reduced load with the expectation of replacing full-time positions. Specifically, they may be scheduled just under full-time hours or given the responsibilities of a full-time position, thereby reducing the organizations' financial obligations at the expense of the employee.<sup>38</sup> This, however, is often contrary to the long term career goals and needs of many part-time or reduced-load workers.

Despite their advantages, amount of work and continuity of work policies can be difficult for managers to implement effectively due to the strains of maintaining a complete workforce as well as monitoring the career paths of employees who choose to work part-time or take breaks. This often requires managers to supervise larger numbers of employees to meet the needs of the organization. Because organizations can and frequently do offer multiple forms of workplace flexibility, managers may struggle with how to accurately and effectively carry out the various types of flex in a way that meets organizational goals while providing structure and support for the employee to succeed.

In sum, workplace flexibility policies allow employees to control different aspects of their jobs (i.e., when, where, how). These differences are meaningful when designing workplace flexibility policies to be used as productivity tools across different types of business demands. Many high-level professional jobs where most work is done by voice or online can allow employees to modify their schedules or work from home. Other professional jobs that require a lot of face-to-face client work or the use of specialized equipment may enable employees to choose *when* they work, but it cannot be conducted away from the workplace. Still other work, such as certain customer-service jobs, can be conducted from just about anywhere but there are explicit limitations involving when employees must be available. It is important for managers to assess the unique benefits and challenges associated with each type of flexibility (Table 3) and as seen from both employee and management perspectives (see Table 4).<sup>39</sup> Managers should take these factors into consideration when new policies are implemented, as there is no "one-size-fits-all" workplace flexibility program, but rather, flexible work arrangements are meant to be just that: flexible. They also should reflect on their own flexibility biases and they should assess how to best bridge manager and employee perspectives so that each side experiences some benefit from the arrangement.



## **Flexibility Lesson 2: Effective workplace flexibility implementation systemically changes organizations to empower individuals and teams.**

Many managers think about workplace flexibility access as an individual accommodation or what Carnegie Mellon researcher Denise Rousseau refers to as an idiosyncratic deal or “I-deal,” which corresponds to when individual employees negotiate for the specific employment arrangement in which she or he works most effectively.<sup>40</sup> However, while some managers might think about flexibility as an individual benefit, progressive organizations know that flexibility is a team sport that can be used as an effective business tool.<sup>41</sup>

A more effective option is to consider the whole workplace as a social system and to implement flexibility across it, albeit not in a one-size-fits-all manner. This systemic approach to flexibility is a paradox; a whole-systems perspective of work that simultaneously allows for a customized work arrangement for each employee or work team in order to maximize productivity for the organization as a whole. Companies using whole-systems approaches to facilitate their own objectives recognize the value of implementing initiatives such as workplace flexibility for a high-performance, cost-effective workplace. For example, increases in real estate costs as well as the desire to become more global and better retain talent led Northern Trust to implement their Worksmart flexibility initiative. Worksmart provides a case study that illustrates a balanced systemic approach to implementing flexibility.<sup>42</sup>

### **Worksmart Team-Based Flexibility: Linking Employees, Technology, and the Business**

Northern Trust is a large global bank with locations from Chicago to London to Singapore. Over the past several years, the company piloted its Worksmart initiative as a balanced approach to implementing workplace flexibility. Kristen Keniry, a VP and Workplace Technology Strategist, explained in an interview that “Worksmart is a formal approach to flexible work that supports the strategy and benefits of decentralization, business continuity, alternative workplaces, management by results, and evolving workplace technology...Worksmart enables improved work-life balance, increased productivity and reduced long-term operating expenses. Worksmart is not a 100% work at home program. It emphasizes output-based management over face time.”

Northern Trust initiated Worksmart because of rising costs of real estate and office space expansion in urban locations, the need to work across many global time zones, and employees’ growing commutes and desires for flexible working. Martin Clarke, the Global Head, Corporate Services Group, elaborated on Northern Trust’s rationale for migrating to Worksmart: “Employers are now looking to attract and retain talent from multiple generations—baby boomers, Generation X, and millennials.... [Worksmart] is an answer to the new work demands of collaboration and mobility, providing tools and workspace.” Clarke notes that a key benefit of Worksmart is that it empowers employees with “the flexibility to work where they are most productive rather than necessarily tying them to a traditional office cube.”

Northern Trust used data and evaluation carefully in its implementation. Starting with the first 33-person Chicago-based work group, the firm first conducted risk assessment and ensured job and work processes could be replicated just as effectively at home as at the office. Rather than initiating telework in response to individual employee requests or based on each manager's leadership style, whole work groups undergo risk analysis of business processes and then migrate to a Worksmart arrangement. During a 90-day migration period, workers and teams are surveyed and answer questions during the team-level migration including:

- The client experience is not affected by my schedule.
- My personal productivity is not impacted by the location in which I work.
- I received information and communication to do my job effectively.
- The technology I need and use is adequate to do my job.

Vice President Kristen Keniry commented on how they used a change management approach to implementing their Worksmart initiative:

*"Moving to flexible working is change management. When you change the way people work, you are changing the space they work in, the way they see each other, and when they work. We are now working with a different world. We have partners and clients in other parts of the country or world where we are constantly managing across time zones. We are integrating technology strategy with real estate, customer and employee strategies. It is a multi-faceted win-win."*

While some people may think flexibility means less rules, a key paradox is that managers and teams must develop formal rules and team charters for "working smart." Their team charters address such issues as common work requirements and protocols to be used for communication processes, ensuring security, and delineating daily work location. Teams agree that individuals will be trusted to have the discretion to work where they are the most productive. Individuals on each team must agree to work at least one day in the office and one day at home on a regular basis each week. Managers are allowed to direct communication preferences for such questions as:

- Which meetings do you expect your teams to attend in person?
- Do you need on-site coverage on certain days?
- Is there a certain number of days you want to limit/allow your teams to work remotely?

A common culture is developed through team charters and protocols. Each employee receives a laptop with a "soft phone" that enables the laptop to be used in communication, which saves costs by reducing need for a cell phone. This initiative was so successful the company is expanding the program around the globe.<sup>43</sup>

## Moving to Balanced Flexibility

The Worksmart case study illustrates a balanced approach to workplace flexibility. It demonstrates the importance of being flex-savvy and using an empowerment approach that helps to avoid all three flexibility traps. The way Northern Trust implemented the Worksmart Initiative addressed changing work life dynamics and

**TABLE 4.** Manager and Employees: Contrasting Views on Workplace Flexibility

Employee Perspective	Manager Perspective
<b>Expected Advantages of Workplace Flexibility</b>	
<ul style="list-style-type: none"> <li>▪ Increased availability for nonwork needs and demands which interfere with work tasks</li> <li>▪ Greater perceptions of control over work</li> <li>▪ Savings in the form of reduced commute time, reduced expenses (e.g., gas, business clothes/dry cleaning, childcare), energy (i.e., personal and environmental outcomes)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Employees are less distracted, more present at work</li> <li>▪ Lower employee absenteeism</li> <li>▪ Allows organization to expand times/regions of availability for clients</li> </ul>
<b>Common Fears Associated with Workplace Flexibility</b>	
<ul style="list-style-type: none"> <li>▪ Policies may not benefit all employees (or specific jobs/tasks; e.g., team tasks, confidential material).</li> <li>▪ Employees who take advantage of flexible policies may be punished (formally or informally)</li> <li>▪ Rules for workplace flexibility use may not be clearly communicated or systematically applied/regulated</li> <li>▪ Flexibility may be used by managers to reward strong performers or punish other employees</li> <li>▪ Employees may feel they are “always on” or required to always be available (rather than have a flexible schedule)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Employees using flexibility might be less productive; managers who value “face-time,” lack effective means of regulating/evaluating performance under a flexible schedule</li> <li>▪ Coordinating or scheduling many subordinates/ teams utilizing workplace flexibility might be difficult, particularly when employee schedules do not overlap with manager’s</li> <li>▪ Establishing and facilitating effective communication with employees utilizing workplace flexibility will be difficult for managers</li> <li>▪ Clients’ needs/demands may not coordinate with employee flexibility</li> <li>▪ More effort may be required of manager to develop and implement flexible policies/practices</li> </ul>

Note: This table describes the competing perspectives of managers and employees about workplace flexibility. Each stakeholder brings unique fears and questions to be resolved. Similarly, each group has unique benefits from workplace flexibility policies. It should also be noted that managers can expect many of the benefits employees experience when they utilize workplace flexibility in their own work.

equity in that no one worker became isolated by being 100% at home nor did any one employee work in the office five days a week. The team developed a culture of mobility that linked technology, employee work-life needs, and business demands.

It also demonstrates that implementing flexibility isn't necessarily all about reducing restrictions in the workplace. Working flexibly can give rise to coordination challenges that must be resolved so that flexibility will have benefits not only for workers, but also for firms and clients. It shows the importance of protocols and risk analysis and some standardization of how flexibility is implemented. In a recent study of primary care physicians, Penn State researcher Forrest Briscoe described the importance of establishing some standardization of work practices along with knowledge management tools to facilitate handing-off work, and clients, across different professional service workers.<sup>44</sup> Without some shared understanding of how work is to be completed, and confidence in the ability of colleagues to take over, it is difficult for dedicated individuals to take advantage of flexibility, particularly in service settings where clients may exert pressure for a particular individual to provide their care. The quality of work can also be undermined if staff cannot easily access each other. This led one virtual public relations firm in Toronto, Canada, to adopt a rule that all staff must honor core work hours to be available to one another and clients.<sup>45</sup>

Whole-systems flexibility requires balance not only across the interests of all stakeholders (such as employees, supervisors, coworkers, and customers), but also between stability and fluidity, between structure and variability. For individuals, sets of rules that make it more possible for others to capably substitute for them in completing tasks can create a freedom to manage their work and family in ways that best suit their aptitudes and home demands.

What does this juggling look like for individuals in an ideal whole-systems flexibility approach? Our research shows that individuals vary in how they prefer to combine their work and personal lives.<sup>46</sup> In large part, this is about our identities as people may be focused on work, on family, or on multiple roles that define them and these role priorities shape how we spend our time and the trade-offs we make. Individuals also differ in their preferences for how to manage the thoughts, emotions, and actions that allow us to combine work and personal life in different ways, or what scholars call managing the "boundaries" between work and home. Some of us prefer to draw stark lines between home and work, perhaps having a separate e-mail account for personal matters or only working when in a separate home office. Others prefer to fluidly meld work and personal life, switching in and out of work and family activities over a day or week, and still others might cycle between separating and integrating. An ideal flexibility system combines rules to facilitate coordination across staff that make choices that allow them to be productive at work, and yet manage boundaries between home and work in ways that make sense for their identities and their personal commitments.

## Conclusion

Workplace flexibility is a productivity tool that managers can use to align employee and organizational interests and goals. By clearly identifying roles and

expectations, employers can reduce some of the common fears associated with these initiatives.

Developing metrics, common flexibility protocols, conducting risk analysis, and worker and employer outcomes-focused assessment programs can help ensure effective rollout and sustainability of flexibility initiatives. Companies such as Hewlett-Packard, Dell, and Deloitte have recognized the value of gathering information and tracking figures assessing the use of flexibility to facilitate long-term success.<sup>47</sup> Some of the most commonly utilized systems include employee surveys, focus groups, and interviews to understand how employees perceive and benefit from the arrangements. Surveys typically include validated scales assessing employee commitment, job satisfaction, and stress and burnout. Canadian technical services company T4G monitors the performance of its IT consultants through tracking billing and profitability, but also through questionnaire feedback and personal meetings with corporate clients to ensure they are satisfied.<sup>48</sup> Other common methods include retrieving archival data of employee usage of the programs and organizational performance in order to identify how the program has been used and the extent to which it has benefitted the parties involved. One other important consideration to better understand the needs of the whole workforce is to examine the behaviors and feelings not only of those employees utilizing workplace flexibility, but those who choose traditional work arrangements.

Workplace flexibility initiatives are increasingly seen as a critical component of a results-driven workplace. More and more organizations are recognizing how flexibility can be used to meet their business objectives and facilitate employee effectiveness on and off the job. Organizations that resist leveraging the potential of workplace flexibility may struggle to attract and retain top talent, lose out to other more innovative companies, and experience reduced profits. This transition in when, where, and how work is done signals that workplace flexibility—when implemented in a balanced approach—is becoming the new normal of the 21<sup>st</sup> century workplace.

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