

2018 RESEARCH REPORT

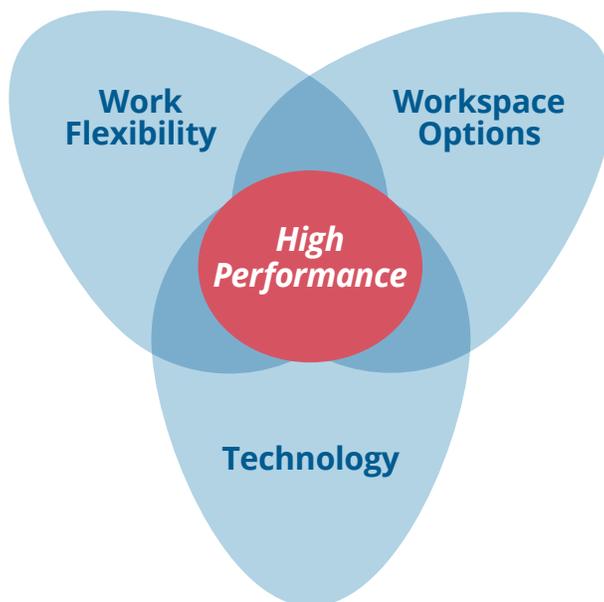
Flexibility in Where, When and How We Work Leads to Business Gains

Success Depends on Strategy and Training



INTRODUCTION

Businesses and organizations are constantly looking to optimize resources, increase productivity and engagement, encourage innovation and collaboration, and attract and retain top talent. New national research shows that the strategic use of work flexibility, technology and workspace options are keys to achieving these business goals and building a high performance flexible work culture. But, organizations have not invested in the training and resources required to utilize flexibility, technology and workspace options for transformational results.



ABOUT THE RESEARCH

In November 2017, the Flex+Strategy Group engaged independent research firm ORC International to reach a national probability sample of 595 full-time employed adults in a telephone survey with +/- 4.02 percent margin of error. The survey and this research report are the most recent installments in a biennial series of studies that have monitored the progress of issues related to work life flexibility from the individual's point of view since 2006. For the survey, "work life flexibility" is defined as having the flexibility in when, where and how you work. It allows you to flexibly allocate time and energy between your work life and your personal life.

OVERVIEW

According to the findings of the Flex+Strategy Group's most recent study of a national probability sample of full-time U.S. workers, flexibility in where, when and how work is done—including remote work—leads to greater innovation, as well as improved communication, creativity, productivity and engagement. This confirms what we've experienced over two decades of helping clients build high performance flexible work cultures: when organizations invest in the right training, tools and techniques—to facilitate how, when and where employees do their jobs most productively and effectively—they realize positive and measurable business results.

But, as we've seen in the headlines, there are those organizations, such as IBM, that blame flexibility for their performance challenges. We argue those employers risk missing out on the very business gains they're trying to achieve. The work flexibility is not the problem. It's the fact that organizations don't know how to use it strategically to transform their business.

How do organizations unlock the full power and potential of flexibility in how, when and where work is done? How do they move toward a flexible work culture where the best people have the mindset, skills and tools to do high quality work in new, more flexible and innovative ways, with the same or fewer resources, while sustaining well-being and satisfaction?

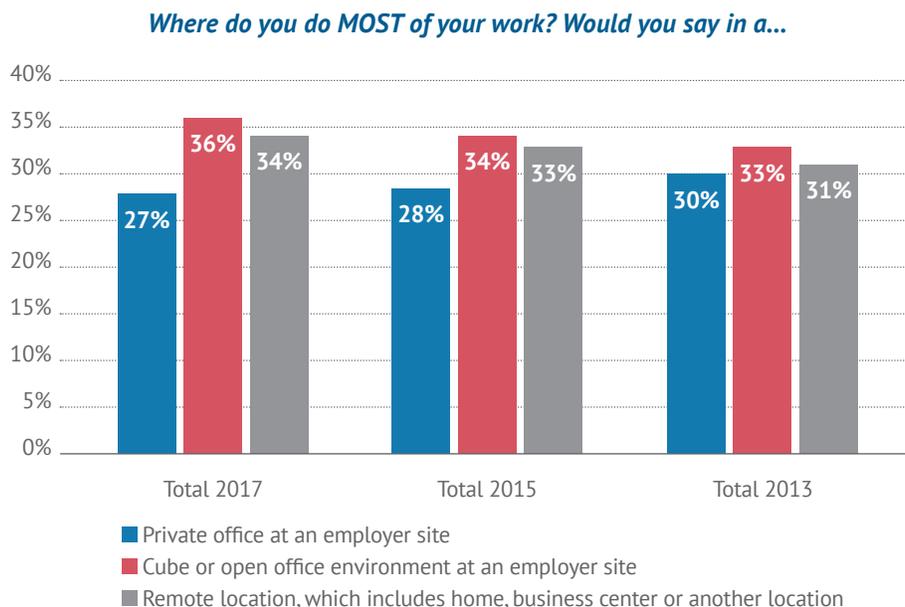
The findings within this report provide a start. They confirm that the basic building blocks required to form a flexible work culture already exist to some degree within organizations, and identify key areas of focus that will begin to transform the use of work flexibility, technology and workspace and take it to the next level of impact. Key findings include:

- ▶ Remote work is here to stay.
- ▶ The majority of remote workers are men (not women).
- ▶ Almost everyone has some degree of work flexibility.
- ▶ Flexibility improves—not impedes—communication, creativity, innovation, productivity and engagement. Remote workers, specifically, noted these benefits.
- ▶ Training and guidance are keys but are lacking for a majority of flexible workers.
- ▶ Technology fuels collaboration and flexible work, but the technology used most frequently remains old-school.
- ▶ Work flexibility isn't broadly seen as a business strategy. To many, it's still considered just a perk.

KEY FINDING

Remote Work Is Here to Stay

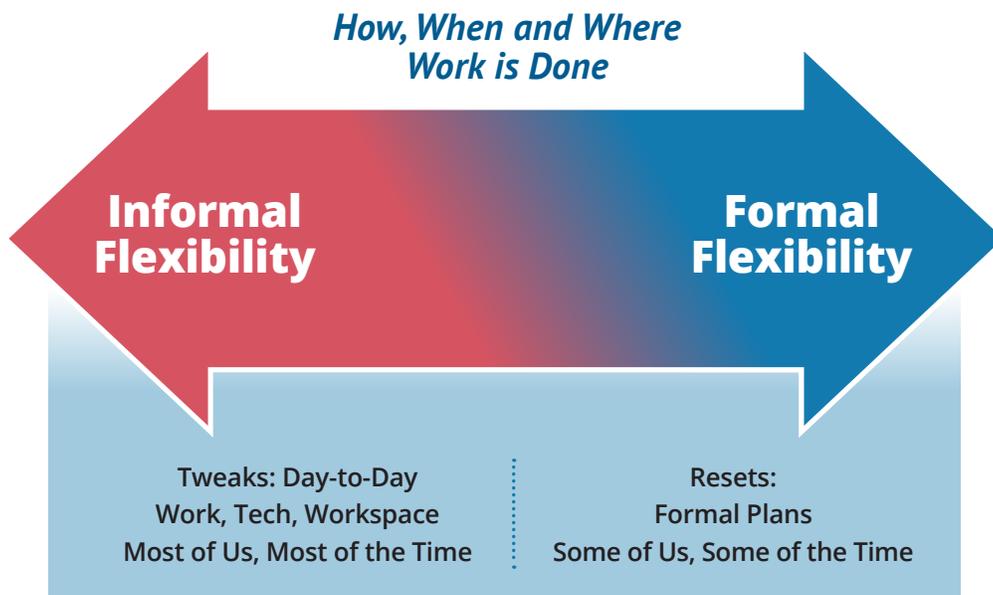
While IBM attracted notice last year when it discontinued its remote work program, more than one-third of U.S. full-time employees now do most of their work from a remote location, 34 percent in 2017. That's up slightly from 31 percent in 2013.



ISSUE: When a high-profile employer announces a pullback on remote work, it's natural for other organizations to question the continuing relevance and staying power of work flexibility. But the research confirms remote work is here to stay. We'll never return to the time when "work" meant going to the same physical space with the same people every day. Instead we should shift focus to the necessary cultural and infrastructure updates required to leverage and benefit from today's flexible work reality.

The survey findings also reinforce that "remote work" doesn't necessarily mean "work from home." It can mean working at another employer site or at a client's office, or in a co-working space, a coffee shop, an airplane or a library. The point is that it doesn't matter "where." The priority is how can employees best get the work done (and take care of personal responsibilities) when everyone is not shoulder-to-shoulder five days a week. For many, working remotely is how they complete tasks that require uninterrupted focus while using the time saved from commuting to go to the gym, see a doctor or participate in their child's science fair.

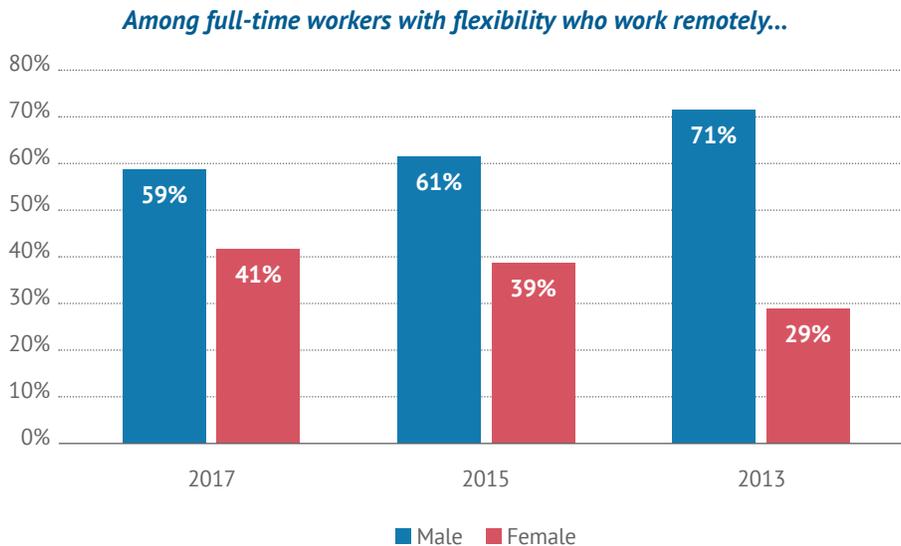
SOLUTION: Shift the language from "work from home" to "work remotely" to acknowledge the many possible locations and focus on how that work will get done well. Encourage ongoing dialogue, individually and within teams, that answers the question, "based on the tasks we are trying to achieve, when is remote work effective and when is it better to physically be together?" Lastly, don't isolate remote work as a stand-alone formal flexible work arrangement that only happens on a particular pre-set day. Instead position it within the culture as part of a continuum of options executed when needed.



KEY FINDING

The Majority of Remote Workers are Men (Not Women)

Men have consistently remained the majority of remote workers. Three out of five are male, essentially unchanged from 2015.



ISSUE: Contrary to what many senior leaders believe, work flexibility, including remote work, is not just a “women’s issue.” It’s an issue for everyone. Unconscious gender bias undermines the potential strategic impact of work flexibility on the performance and well-being of all employees. When flexibility is viewed as needed by only a portion of the workforce (women, parents), then it’s isolated outside of the core day-to-day operations of the business and the culture isn’t forced to adapt and change.

SOLUTION: Start with the premise that the business benefits when everyone knows how to leverage, with strategic intention, the flexibility they need to be their best, on and off the job. If this research is not enough to change hearts and minds, then conduct an internal survey for confirmation. See how quickly the conversation changes from “it’s a women’s issue” to “it’s a strategic imperative.”

KEY FINDING

Almost Everyone Has Some Degree of Work Flexibility

As has been the case since 2011, almost all full-time U.S. workers (98%) reported they have some degree of work flexibility.

When thinking about the amount of work life flexibility you CURRENTLY have, do you have...

	2017	2015	2013	2011
Have any work life flexibility	98%	96%	97%	98%
More work life flexibility than at this time last year	26%	20%	23%	17%
Less work life flexibility than at this time last year	13%	18%	16%	15%
About the same	59%	59%	58%	66%
Don't have any work life flexibility	1%	3%	2%	2%

ISSUE: The basic building blocks of work flexibility already exists to some degree in organizations. That flexibility can run the gamut from “I informally leave 15 minutes early to go to my son’s soccer game” to “I officially do all of my work from a remote location every day.” Yet, the fact that everyone says they have some level of work flexibility doesn’t mean it’s the right amount, the right type or that they use it strategically. That happens when organizations evolve from asking “IF we should support flexibility in the way work is done,” to “HOW do we optimize it and build a flexible work culture that achieves high levels of performance and well-being?”

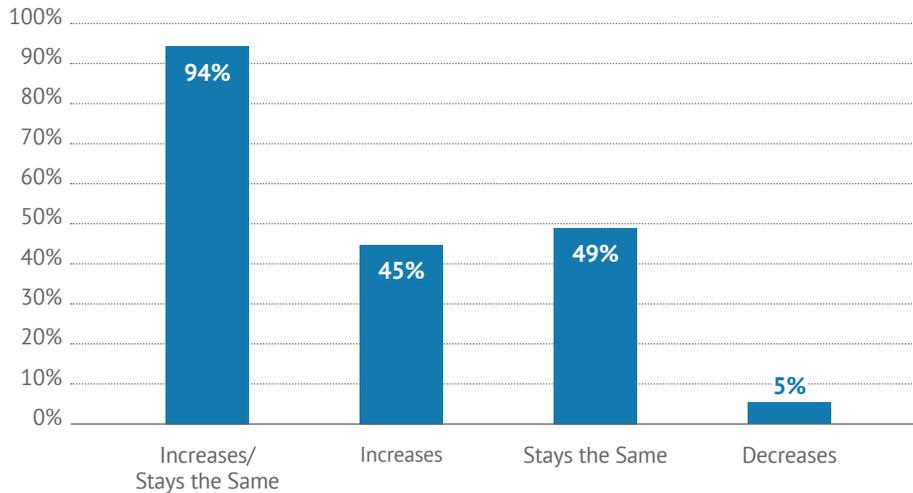
SOLUTION: Give people, teams and managers the skills and tools to identify the right type of flexibility required to accomplish specific responsibilities and tasks, both on and off the job. This determination is part of an ongoing planning process when flexibility is actively and strategically used as part of a flexible work culture.

KEY FINDING

Flexibility Improves Communication, Creativity and Innovation with Colleagues

Of those who do work flexibly, 94 percent said their ability to “communicate, create and innovate with colleagues” either increases or stays the same with 45 percent saying it actually increases their ability to work effectively with their team. Only 5 percent reported a decrease.

When you have flexibility in where, when and how you work, do you feel your ability to communicate, create and innovate with colleagues...



KEY FINDING

Many Remote Workers Also Report Increased Communication, Creativity and Innovation

Among remote workers, 96 percent feel their communication, creativity and innovation with colleagues either increases or stays the same, with only 4 percent reporting a decline. 41 percent reported an increase.

When you have flexibility in where, when and how you work, do you feel your ability to communicate, create and innovate with colleagues...

	Total	Do most of your work from a remote location
Increases	45%	41%
Stays the same	49%	55%
Increases/Stay Same	94%	96%
Decreases	5%	4%

ISSUE: Consistently, we find that when you give people a degree of control over how, when and where they are able to do their jobs and manage their lives, they are more intentional and less likely to operate on autopilot. Teams in a high performance flexible work culture challenge the status quo asking, “Why are we doing it that way? How could we do it better or differently?” The result is ongoing work process innovation that achieves many of the same efficiencies as operational cost-cutting but in a more positive, growth-oriented manner.

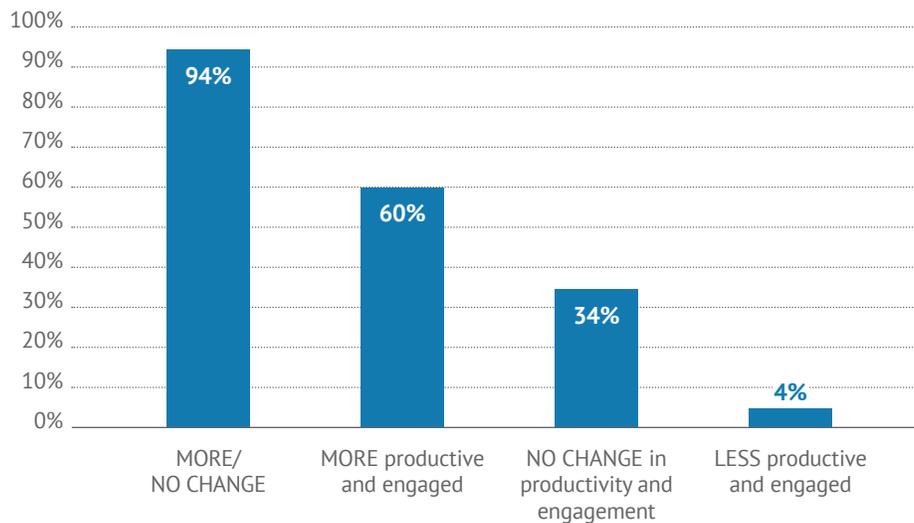
SOLUTION: Give teams the skills, tools and permission to work together to coordinate how, when and where they will complete the work they need to get done. Sometimes they'll decide that working onsite together is the best choice, and other times, as long as people are accessible and responsive, location doesn't matter.

KEY FINDING

Flexibility Improves Productivity and Engagement

Of those with work flexibility, 60 percent reported they feel “more productive and engaged.” Only 4 percent said they are less so, with 34 percent feeling their level of productivity and engagement is consistent.

When you have flexibility in where, when and how you work, do you feel...



KEY FINDING

Remote Work Increases Productivity and Engagement

Of those who reported doing most of their work from a remote location, a majority (58%) reported feeling more productive and engaged, with only 2 percent saying they are less so.

When you have flexibility in where, when and how you work, do you feel...

	Total	Do most of your work from a remote location
MORE productive and engaged	60%	58%
NO CHANGE in productivity and engagement	34%	39%
MORE/NO CHANGE	94%	97%
LESS productive and engaged	4%	2%

ISSUE: Many leaders are afraid that if you give individuals and teams greater control of how, when and where they do their jobs that flexibility will be abused and less work will get done. Our experience is that most managers fundamentally trust their people, but are cynical that they won't know if people are working if they can't "see" them.

That cynicism quickly disappears once leaders and managers experience the power and potential of a flexible work culture in action. They gain confidence in their ability to lead a flexible work team and in the ability of their people to deliver the same or better results.

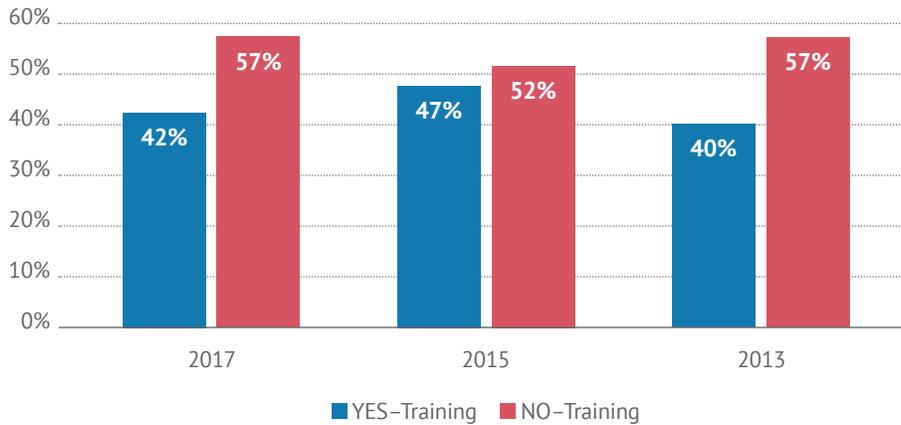
SOLUTION: Leverage the power of the pilot. It's not enough to train individuals, teams and managers in the skills and tools that build a flexible work culture. They have to have time and space to actively experiment together with new flexible ways of working. When they do, manager cynicism transforms into confidence and support while employee collaboration, productivity and engagement increase.

KEY FINDING

Training and Guidance Key, but Lacking for Majority of Flexible Workers

While almost all employees report having some degree of work flexibility, the majority (57%) received no training or guidance on how to manage it. Fewer reported receiving such instruction than previously—only 42 percent in 2017 compared to 47 percent in 2015.

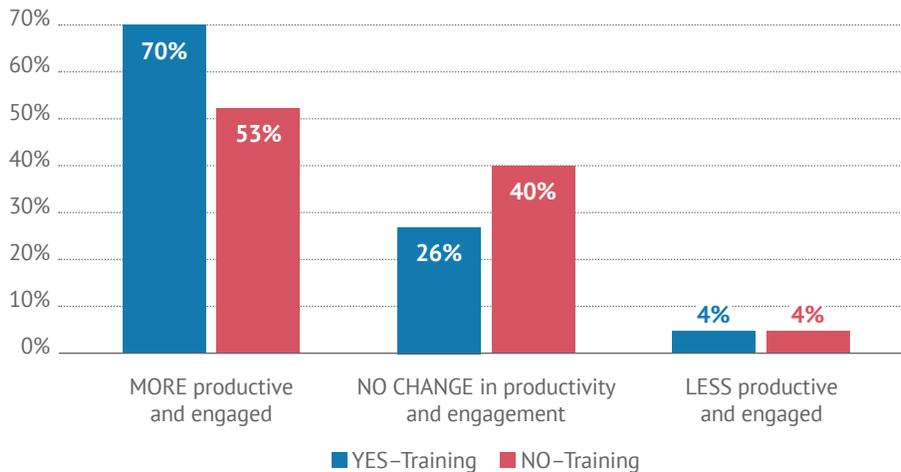
Does your employer provide any guidance or training to help you manage your work life flexibility?



Many organizations have a glaring lack of training and resources to support the most effective use of work flexibility. But this also shows there is a powerful opportunity for those organizations since the investment in these supports can yield significant and positive business outcomes.

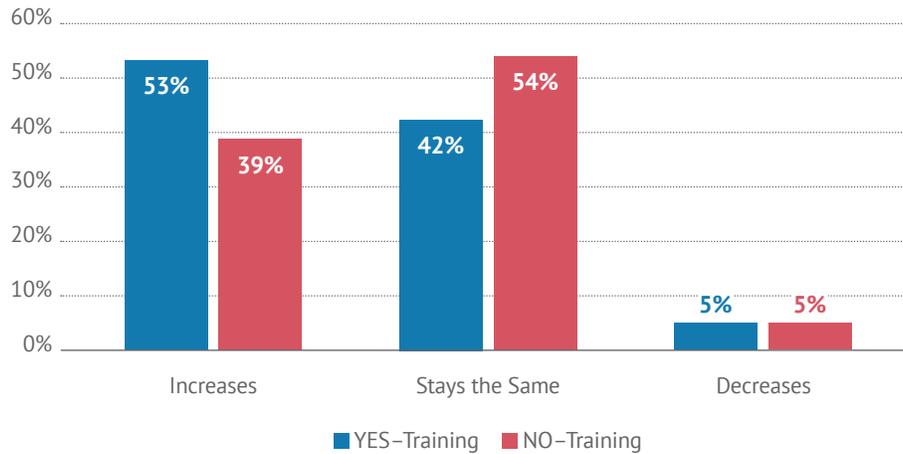
Productivity and Engagement: There was a notable difference between those employees who received training and felt their flexibility makes them more productive and engaged (70%) versus those without training who also noted an increase (53%).

When you have flexibility in where, when and how you work, do you feel...



Communication, Creativity and Innovation: Similarly, there was a significant difference between those flexible workers that did receive training and report their ability to communicate, create and innovate increases (53%) compared to only 39 percent among those who didn't receive guidance.

When you have flexibility in where, when and how you work, do you feel your ability to communicate, create and innovate with colleagues...



ISSUE: It's not enough to hand someone a laptop and say "just get your job done." Training is key to unlock the full power of a high performance flexible work culture by optimizing potential increases in productivity and engagement and improvements in team communication, creativity and innovation.

SOLUTION: Individual employees, teams and managers need to learn how to think, behave, collaborate and communicate in a high performance flexible work culture, but training alone is not enough. It must be followed by a period of active experimentation with these new skills and tools. They need space, support and permission to try, fail and try again. This pilot period builds the momentum of innovation that breaks through very natural human resistance to change. People learn and cultures transform through trial, error and practice.

KEY FINDING

Technology Fuels Collaboration and Flexible Work

More than three-quarters (76%) of all respondents feel advancements in workplace technology have made it easier to team up with and communicate with colleagues, and 58 percent said it has made it easier to work flexibly. Employees that received flexibility training were more likely to note those positive views. However, four in ten of all employees feel the increase in technology has created more work and also said it feels “a bit like ‘big brother’ is watching you.”

How would you describe your feelings about the increase and advances in today's workplace technologies?

	Total	YES-Training	NO-Training
It's made it easier to team up with and communicate with supervisors or colleagues	76%	85%*	71%
It's made it easier for you to work more flexibly such as occasionally changing your hours or the location of where you do your work	58%	66%*	53%
It's created more work for you	40%	42%	39%
It feels a bit like “big brother” is watching you	40%	37%	41%
Don't Know	6%	3%	7%

*Difference statistically significant

ISSUE: The evolution of technology has, in large part, paralleled and fueled the flexible transformation of work. Employees recognize that technology has enabled communication and collaboration outside traditional workspaces and hours. But that increased access to work and colleagues comes with a price. Employees need to be more thoughtful about when they engage and when they turn off which should be part of flexible work culture training. Because the sense of being “always on and always connected” can feel like big brother, especially if organizations and teams have not clarified boundaries around accessibility and responsiveness.

SOLUTION: The research confirms that the positive impacts of technology are significantly enhanced by training. That training can be as basic as how to sign on to the VPN or facilitate a meeting using video conferencing to the more advanced level of how to manage workflow using a cloud-based project management platform. This is a challenge to IT departments and other related professionals to create an ongoing training strategy that informs and supports people at all levels of tech adoption.

KEY FINDING

Technology Used Most Frequently Remains Old-School

Despite widespread availability of collaborative technologies that improve efficiency, most employees (65%) go old-school using email, spreadsheets and word documents as their “frequently” used tools to update supervisors and colleagues about work progress and performance. Only 17 percent noted frequent use of video/web conferencing and just 8 percent frequently used cloud-based project management software.

How often do you use the following tools to update supervisors and colleagues about your work progress and performance? Would you say FREQUENTLY...

	Total
Email, spreadsheets and word docs	65%
Video or web conferencing software	17%
Project management software	8%
Telephone calls or conferencing	53%
In-Person meeting	57%

ISSUE: To a certain extent, the difference between simply offering work flexibility and building a high performance flexible work culture depends upon the type of technology adopted and used day-to-day. Emails, spreadsheets and Word docs can be shared electronically but they usually live on the hard drive of one person’s device making it hard to access remotely or share with others. Organizations have a long way to go to gain the untapped benefits of utilizing more advanced forms of collaborative technology.

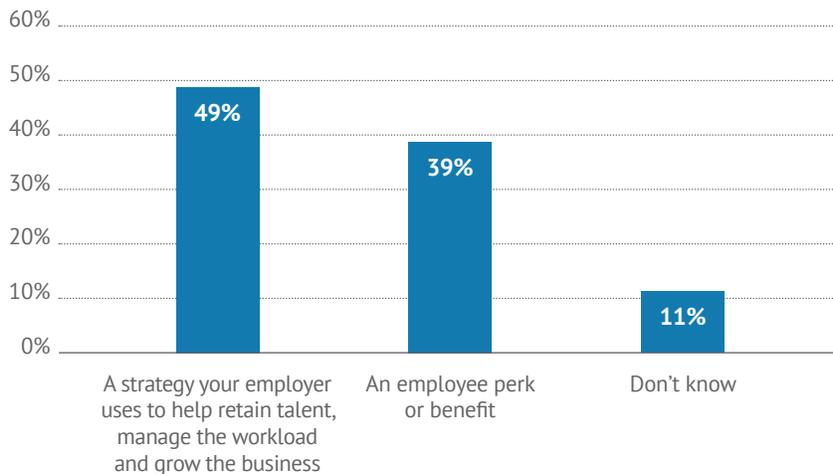
SOLUTION: Organizations that take work flexibility to the next level and make it part of their operational and cultural DNA actively use advanced collaboration tools, such as video conferencing and cloud-based project management software. These types of technology provide access to information from any location, anytime and anywhere. Like all new tools, mastering video conferencing and transitioning to a cloud-based project platform requires time and training. But the return in effectiveness and efficiency can be the difference between simply working flexibly and using flexibility to achieve higher levels of business performance and well-being.

KEY FINDING

Work Flexibility Still Viewed as a Perk, Not a Strategy

Unfortunately, less than half of those employees with work life flexibility view it as a strategy their organization uses to “help retain talent, manage the workload and grow” while 39 percent still see it as a perk or benefit and the remaining 11 percent “don’t know.”

Do you view work life flexibility in your organization as...



But, interesting to note, remote workers were significantly more likely to view flexibility as a strategy—as compared to those who have work flexibility, yet who opt do most of their work onsite.

Do you view work life flexibility in your organization as a...

	Total	Do most of your work onsite (Private Office/Cube), but still have flexibility	Do most of your work from a remote location
Strategy your employer uses to help retain talent, manage the workload and grow the business	49%	46%	56%*
Employee perk or benefit	39%	43%	34%
Don't know	11%	11%	10%

*Difference statistically significant

Additionally, a significantly higher percentage of employees that received flexibility training (regardless of location) also noted it as strategy.

Do you view work life flexibility in your organization as a...

	Total	YES-Training	NO-Training
Strategy your employer uses to help retain talent, manage the workload and grow the business	49%	57%*	44%
Employee perk or benefit	39%	36%	42%
Don't know	11%	7%	13%

*Difference statistically significant

ISSUE: Building a high performance flexible work culture takes time, people and money. Unless work flexibility is seen as a strategic imperative that addresses many of the key challenges facing a business, it will be marginalized among the other priorities competing for a limited amount of resources. As an employee perk or benefit, work flexibility shouldn't just be a feel-good recruiting tool because it won't keep the best people once they are hired. Without an articulated strategy it won't help them do high quality work in new, more flexible and innovative ways, with the same or fewer resources, while sustaining well-being and satisfaction.

SOLUTION: From the beginning, position work flexibility as a business strategy with broad operational impact. Back that up by calculating the potential ROI from making the investment to transform the organization into a flexible work culture. Consider the employee recruitment and training cost savings if your organization was able to improve your retention rate by X percent over the next five years. Calculate the real estate overhead cost savings from having a more productive and satisfied distributed workplace. Identify key productivity and quality metrics, and gauge the bottom line impact of employees being able to get more done on and off the job, even better and smarter, in the same amount of time. Suddenly, dedicating resources toward a flexible work culture is a no-brainer.

SURVEY METHODOLOGY: The survey was conducted November 2–5 and 9–12, 2017 by ORC International using two probability samples: randomly selected landline telephone numbers and randomly selected mobile (cell) telephone numbers. The combined sample consists of 595 adults (18 years old and older) employed full-time in the continental United States. Of the 595 interviews, 200 were from the landline sample and 395 came from the cell phone sample. The margin of error for the sample of 595 is +/- 4.02 percent at the 95 percent confidence level. Smaller subgroups will have larger error margins.

ABOUT THE FLEX+STRATEGY GROUP: Led by Cali Williams Yost, “one of the most sophisticated thinkers” on work, life and flexibility, the Flex+Strategy Group (FSG) is a team of experienced experts in flexible workplace strategy, change management, leadership, instructional design and communications. For more than two decades, Yost and her team have studied and changed the way business leaders and employees think about how, when and where we work. FSG has assisted hundreds of organizations to create high performing flexible work cultures that strategically use flexibility, technology and workspace options to work smarter, and attract and retain top talent who value control over how to manage their work and lives.

ASSESSMENT

Does Your Organization Have a High Performance Flexible Work Culture?

Does Your Organization...	YES	NO
Have leadership that understands the broad potential impact of flexibility in how, when and where work is done on business performance and employee well-being?		
Maximize all types of formal and informal work flexibility to get job done most effectively and productively?		
Maximize technology to get work done most effectively and productively?		
Maximize workspace options, on and offsite, to get work done most effectively and productively?		
Support and encourage experimentation and work process innovation?		
Define and measure productivity and/or quality?		
Provide managers with the skills and tools to lead a flexible work team day-to-day?		
Provide employees with the skills and tools to flexibly manage the fit between work, and life, effectively?		
Coordinate the use of work flexibility, technology and workspace, within and across teams?		
Attract and retain top talent by providing informal and formal work flexibility that meets their needs and the needs of the business?		

10–9 “Yes” Responses: Your organization has unlocked the full power and potential of a high performance flexible work culture. It’s adapted to the historic transformation in the way work is done and is reaping the rewards—better talent management, increased productivity, more collaboration, cost savings and greater employee satisfaction, on and off the job. But a flexible work culture that achieves high performance and well-being is never “done.” Put in place a process to regularly review and recalibrate, as needed, to sustain the strategic benefits to the business and people.

8–3 “Yes” Responses: Your organization is ready to move beyond *IF* you should offer and support work flexibility, technology and workspace options to *HOW* do you unlock their full power and potential by investing the resources to build a flexible work culture. Give your people, teams and managers the skills and tools to leverage flexibility in how, when and where work is done, with strategic intention. Train and then give them time to actively experiment together with how to do their jobs and manage their lives in new, more flexible, and innovative ways that achieve high performance and well-being.

2–1 “Yes” Responses: Your organization is stuck in an outdated, inflexible workplace structure and culture. This undermines the potential productivity and performance gains your business can achieve, today and in the future. Begin by identifying and studying the pockets of organic flexible work success that most likely already exist in your organization, but which fly under the radar—flexibility in how, when or where people work, use technology and available workspace, on and offsite. Celebrate these successes and begin to close the gaps in the mindset, skills and tools that build the foundation of high performance flexible work culture success.