



[A number of you have told me recently of your concerns with your company's progress on flexibility. You lack metrics on your company's strengths and weaknesses and how you stack up against other companies. Naturally, if the nature of your firm's flexibility isn't clear to you, is it opaque to your employees and potential recruits? And if you don't know the current state, how can you chart useful progress? This may be an ideal time for an audit to tell you where you stand and what would be valuable to change. The approach below is based on the [FlexAudit™](#) segment on the Rupert and Company website.]

Power of a flexibility audit Do your leaders fully grasp and promote flexibility? Is your system delivering maximum business impact? Do your managers and employees know best practices and apply them? Do your managers welcome new arrangements as much as employees do? The answers to these and many more questions help form a compelling overview of your flex system.

A comprehensive flexibility audit resembles a financial audit in using a broad range of tools and processes to test the soundness, effectiveness, integrity and impact of your flexibility system. Core tests performed during a typical audit include:

- 1. Procedure** Determine awareness of purpose, principles, procedures of company approach
- 2. Guidance** Assess internal systems for thoroughness, clarity and guidance elements
- 3. Compliance** Test process compliance for consistency, completeness of tool use
- 4. Validation** Determine accurate usage levels of various FWAs
- 5. Impact** Validate broad business results: retention, engagement, attraction and productivity

1. PROCEDURE Financial audits have value because a firm's practices and procedures are tested against generally accepted industry standards. A research and consulting firm like ours can draw on our experience with the widely used flexibility best practices to conduct a similar review. Elements of the procedural or first step of an audit can include:

- Reviewing clarity of purpose in leadership statements, website and communication tools
- Determining the completeness and focus of a statement of principles or "rules of the road"
- Assessing the clarity and business-like nature of procedures for managing flexibility

2. GUIDANCE A second step in a thorough audit examines the tools and general guidance that create a consistent approach throughout the initial proposal process and over the years of the initiative. Without such clear and sustained direction, flexibility efforts tend to atrophy. Key elements in this portion of an audit include:

- An eighteen-point review of the essential components of guidelines and approach materials
- An assessment of the productive guidance provided to users and reviewers of proposals
- An evaluation of the effectiveness of the long-term training and communication strategies

3. COMPLIANCE The heart of any audit is to measure compliance with stated standards. Thus the third key step in the audit is to assess how well employees and managers are using the essential policy and procedure infrastructure. This is done through:

- Examining a random sample of proposal forms to assess their business-beneficial quality
- Conducting surveys and focus groups with employee users and managers to test compliance
- Examining consistency, frequency and timeliness of scheduled FWA evaluations

4. VALIDATION Tracking and claiming the growth in usage of FWAs is important to companies. And validating these claims is equally important. Assuming firms collect the data either manually or online, the fourth step in an audit involves validating the usage numbers through:

- Reviewing tracking system for ability to capture new and terminated FWAs
- Contacting a random sample of approved FWA users to confirm current status
- Fielding a representative online survey to confirm accurate capture of all formal options

5. IMPACT A major value of an audit is to identify and quantify positive business gains that result from a solid initiative. The fifth step in an audit is to capture larger business impacts and measurable gains of individuals by:

- Interviewing key senior leaders on flexibility outcomes and potential
- Comparing achievements against company-wide goals using range of metrics
- Using a mix of measures, including interviewing, to assess divisional pilots
- Validating business gains proposed in forms through interviews, focus groups

Report & Recommendations A final audit report summarizes the findings, conclusions and recommendations of the customized review. We use the data to reliably describe the level and character of FWA usage, the state of core processes and the business value of the flexibility initiative underway. Based on these conclusions and the opinions expressed in all interviews, we suggest strategic options for both deepening the overall effort and improving the existing procedures and practices.

Many companies have put major flexibility initiatives on hold until the economy resumes growing and labor markets stabilize. This summer and fall are excellent times to conduct an audit and plan next steps in making your organization more flexible. Please go to our website (www.RupertandCompany.com) and follow the [FlexAudit™](#) link at the bottom of the home page.

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