



FlexBulletin #37: Proposal Form as “Productivity Promise”

September 30, 2010

[In our late August issue of the Bulletin – [FlexBulletin #36: Productive Flex One Deal at a Time](#) – we began a systematic review of the ways in which flexibility has been slighted or ignored as a productivity tool in today’s workplace. We asked then “how would one approach Flexible Work Arrangements and their typical process elements to enhance the focus on outcomes? What are we assuming and taking for granted that we should reexamine and redesign?” (We have included the bulk of [FlexBulletin #36](#) below for easy reference and useful background.)

We went on to observe that a good starting point for a reexamination was the ubiquitous FWA Proposal Form. Typically the first two questions on this form offer an opportunity to identify the potential productivity of a redesigned flexible work arrangement. Those questions are:

- 1. In what ways might this proposed way of working allow you to maintain or improve your individual performance or contribution? [or in brief, how can I work better?]*
- 2. How might this way of working improve the way you and your team deliver services to our internal and external clients? [or, how can I serve customers better?]*

How should these core questions be framed and addressed to better position flexibility as a productivity tool?]

The challenging climate: rarely thinking of blending productivity and flexibility

As in many aspects of life, attitude may not be everything – but it’s a major thing. We should start our thinking about flex & productivity by looking at how we look at success in flexibility. We urge long-shot Olympic athletes to believe they can establish world records. We encourage the young and disadvantaged to believe that they can enter the college of their dreams. We are long on dreams, visions and stretch goals in our companies. But do we as leaders and coaches strongly assert that by working flexibly we can be very successful, unusually productive, rapidly promoted and widely praised winners in our workplaces? Can we win the flexibility gold medal in our firm? Is there one?

Probably not. In fact, as you read that flex success list, did you chuckle a bit? Did someone come to mind – a senior leader, a manager you’d encountered – who thought something like this:

- True productivity occurs when a smoothly running team is constantly interacting
- The only way to fully respond to customers is with all hands on deck, and available
- The only way to assess real star power is to see your talent “on the hoof”
- With a solid team in front of you, you don’t need metrics to know who’s producing

When you hold these fairly traditional views, it seems almost unthinkable to envision flexibility co-existing with productivity. And if it's hard to imagine the process, it's quite challenging to envision a productivity-oriented process or form – or outcome.

A chilling environment: considering flexibility and productivity unlikely

Of course not all managers and leaders think this way – exactly. But shades of this thinking do occur pretty broadly in organizations, and they can be quite destructive of people seeing flexibility as a productivity tool. This moderate skepticism can look like this – a sort of damning with faint praise:

- It's amazing that people are able to collaborate when they're dispersed
- It's great that some customers turn out to be as flexible as we are
- Flexibility is a great thing early in a career, but to move up you have to move on
- It's great to have metrics for flexible work, but you can't compare apples and oranges

While the traditionalist may see little prospect for flexibility at all, the skeptic more likely sees the prospect for just a little flexibility. And that exceptional flexibility is an unlikely candidate to be paired with productivity.

The dismissive environment: not envisioning flexibility meeting productivity

In our inventory of the ways we never get to using productivity tools for flexible arrangements, perhaps the most benign and pervasive are forms of pigeon-holing:

- Flexibility is an employee benefit, somewhat of a cross between PTO and healthcare
- Whether stated or not, it's an accommodation to meet family needs
- Offsite work is a trade-off: company savings vs. employee space donation

These very different ways to position flexibility all have one thing in common: they place it many, many miles away from any notion of enhanced productivity. The question is never asked nor answered.

[Author's note: I generally write these Bulletins in a fairly disciplined and straightforward manner, usually with a rough overview. So it was with this one. Except that as I wrote, it took off in a direction quite its own. I can see quite clearly why that happened. I had intended – as the two questions from the form at the top indicated – to plunge into the mechanics of the proposal form, to show how a well-developed form could project and set in motion an impressive productivity process. But that tack was premature. In fact, one of the reasons the productivity potential is not realized in our organizations is that there is a large attitudinal barrier that keeps us and our leaders and peers and employees from ever going there. I think that fact needed to be acknowledged. It is one reason we and many of our clients have been spending more time working with senior leaders to shape attitudes toward flexibility. And it is something we will address this fall in more detail

In the meantime, I will write another Bulletin in the next week, doing what I had promised to do in this one – describing ways to leverage the proposal form for productivity-oriented flexibility.]

Best regards,
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[Excerpt from *FlexBulletin* #36]

Is flexibility a productivity tool or a nice thing to offer?

So how does one make the case that widespread flexibility creates measurable gains in productivity? We believe that if you canvassed the great majority of company leaders and managers, with or without a multiple choice list, to the extent they were aware of and valued flexibility they would say it is:

- an employee benefit, helping employees balance work and family needs
- an employee satisfier, allowing people to work from home once in a while
- a retention tool, part of a basket of best-place-to-work practices
- a way to save real estate costs (moving up the charts quickly)

We suspect that few senior decision-makers would automatically put productivity on that list. As practitioners we might. But for expansive, healthy and dynamic flexibility to occur, what ultimately counts is what company decision-makers believe to be true.

Touting productivity as a flexibility outcome is not enough. What matters is:

- Clear goal-setting, with positive outcomes that matter to the business
- The achievement through flexible scheduling and staffing of unique outcomes
- Credible metrics and a reliable assessment process to capture gains
- A systematic means for summarizing and sharing advances in productivity

Revisiting the broadly used FWA proposal / productivity form

So how does one go about this? We will focus on just one enabler for this process – and happily one that is ready to hand for almost every **Bulletin** reader. This is a tool many of you have worked with – and it is possibly being under-utilized right now dozens or hundreds of times a day. The “Flexible Work Arrangement Proposal Form,” with only modest edits, has been adopted by many hundreds of companies over the last decade.

This 7-9 question form was an early attempt to provide a clear mechanism for bringing consistency to the process of proposing and accepting FWAs. Its value included:

- Anchoring the flexibility dialog in a “business-based”, not ad hoc process
- Eliminating personal reason or motivation from the decision process
- Exploring how one’s proposed arrangement could increase personal effectiveness
- Identifying how different ways of working could add value (i.e. productivity) to the firm

In the mid-1990s our Flexibility Consulting Practice at WFD Consulting popularized an early prototype of this form developed by Kimetha Firpo when she was at Chicago’s Harris Bank. We didn’t copyright it and the form spread rapidly as a tool of choice for companies moving from family reasons to business reasons for FWA decision-making..

What do the proposal forms propose – and reveal?

Looked at from a design perspective, this form would seem to provide a healthy framework for charting flexibility’s possible productivity gains. Paired with a decent evaluative process, each individual FWA could project gains, capture data and apply

metrics. Managers could oversee this process. Thus each proposal could address how one could “work better” and “serve clients or the firm better,” and this process could be integrated into the standard or a separate performance review.

So, how are these forms being used in fact? Are they fulfilling their productivity potential? In my consultative role, I have reviewed many, many thousands of FWA proposal forms in dozens of companies. No doubt many of you have seen your own stack of completed forms. The vast majority of these have shown:

- Limited thoughtful attention to the “effectiveness” and “value” questions
- Little back-and-forth between employees and managers exploring these issues
- Rare attention to metrics or an evaluative process that would tell a useful tale

This is a disappointing fact. If one envisions hundreds of more productive ways of working being rolled up into a compelling productivity story – only one aspect of productivity, but an interesting aspect nonetheless – then our experience suggests that we are missing out on a key opportunity in the challenging times ahead. Happily we have had a number of client experiences of late which suggest ways to transform the proposal process.

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