



FlexBulletin #63 – Right Tracking vs Wrong Track

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Your company may have or be adopting a conventional set of Flexible Work Arrangements or the Collaborative Scheduling tool kit described in [Bulletin #61 – NEW Co Scheduling Tools](#). For several years few flexibility adopters have installed a new system without seeking or securing a so-called tracking system.

These systems vary in design, complexity and cost. We have a number of clients who have managed with a manual system that rolls up the information from proposal forms into an Excel spreadsheet. Others built automated proposal processes and spread the identified usage across business units. And some bought or leased external systems that automated the proposal process, captured usage data and issued regular reports.

Such “tracking” has some value – but may ultimately prove to be headed down the wrong track. For that reason we believe that what we call a Monitoring System aims more clearly at the right track. Here’s how.

The idea of tracking is a relatively new one. I remember the first time I heard a rationale for it:

“The great value comes in letting us see differential approval rates among the business units or by option. It allows us to report what’s going on and correct unacceptable differences.”

These struck me as both modest goals and highly difficult ones to achieve. Identifying which businesses seemed to encourage or discourage telecommuting is quite straightforward. But why were certain decisions made? Could they be second-guessed? And who intervenes with a business unit leader to say, with what authority, that s/he’s fallen short of a (typically) unstated quota? How does tracking translate into transformation? It seemed to me that it probably doesn’t.

Monitoring Systems are noticeably different. As true flexibility implementation tools, they can more easily become vehicles for greater transformation by offering:

- **CREATIVE, RESPONSIVE, EXCEPTIONALLY SECURE HOSTING**
- **FULLY COLLABORATIVE, VALUE-ADDING PROPOSALS**
- **SUPPORT OF A BROAD RANGE OF OPTIONS AND HYBRIDS**
- **THOROUGHLY AUTOMATED ASSESSMENT AND METRICS TOOLS**
- **EARLY IDENTIFICATION OF SKILL DEVELOPMENT PATHWAYS**
- **SEAMLESS LINKAGE TO ROBUST AUTO-COACHING SYSTEM**

As mentioned above, there is more than one way to set up “tracking.” These days many companies charge the IT group with designing and launching an automated proposal system. That often means, among other things, that a system with limited features has to compete for upgrade time with other IT priorities. Monitoring Systems are positioned differently.

CREATIVE, RESPONSIVE, EXCEPTIONALLY SECURE HOSTING maximizes creativity:

- External hosting provides access to a range of proven flexibility skills and resources
- Innovation and improvements can be rapidly shared across cooperating clients
- Rapid, highest priority troubleshooting and support are not trumped by internal IT needs
- The highest security systems and data centers enable the fullest use of internal data

FULLY COLLABORATIVE, VALUE-ADDING PROPOSALS can be thoroughly supported

Most companies with formal flexibility use a variation of the business-based proposal form we helped pioneer nearly two decades ago. This free-form approach has an uneven record of capturing meaningful answers to results-oriented questions. When integrated into a tightly designed monitoring system, a measured proposal form can offer the following:

- Questions seeking to identify business outcomes can be standardized
- Goals can be quantified for more precise definition and assessment
- Potential impacts on colleagues can be better anticipated and catalogued

SUPPORT OF A BROAD RANGE OF OPTIONS AND HYBRIDS enables greater flexibility

You can pair a Collaborative Scheduling system or an FWA approach with a Monitoring System. A distinct value of such systems is that they allow a company greater flexibility in adding and supporting new options. While Co Scheduling encourages this evolution of options, flexibility in general is moving in this direction and systems can:

- Make it easy for system managers to add, modify and integrate options
- Position options such as partial retirement and compressed weeks for easy integration
- Standardize hourly choices such as team self-scheduling and shift swapping
- Accommodate truly diverse – and even dramatic – hybrid schedules

As flexibility migrates toward greater collaborative scheduling, such fluidity in systems matters

THOROUGHLY AUTOMATED ASSESSMENT AND METRICS TOOLS strengthen feedback

Our experience over the years with dozens of clients and hundreds of users and managers reveals a remarkable inconsistency in the structuring, scheduling and monitoring of performance feedback. It is often unclear if, when and how to provide comment – and if it's seen as really needed or just a nice-to-have. And while we have heard in flex user studies for years that feedback is especially important to them, our recent [Millennials Speak](#) research underscored the value attached to feedback by this growing part of the workforce. A Monitoring System can offer:

- Clear, measurable outcomes that allow systematic assessment
- A fully automated schedule of brief targeted evaluative messages that capture gains
- Brief, email-driven pairs of assessments that can be sent to managers and employees
- Individual feedback that can be aggregated into a range of useful reports
- A large body of data can be mobilized by program managers to build creative reports

EARLY IDENTIFICATION OF SKILL DEVELOPMENT PATHWAYS prepares training

A limitation of many flexibility initiatives is a “sink or swim” approach to new arrangements. Read the guidelines, fill out an automated proposal – and then the new participant and manager are largely on their own. The Monitoring System takes a lifecycle approach. It assumes that time and coaching resources are limited, that a focus on skill development can pay off and that targeted, brief interventions can build success. Portions of the assessment process can:

- Collect two-party or multi-party feedback on the level of flexible management skills
- Analyze the kind of online training modules needed as corrective measures
- Capture the overall impact of diverse training, and test a variety of options

SEAMLESS LINKAGE TO ROBUST AUTO-COACHING SYSTEM builds success

Identifying training needs is a critical step toward success. The Monitoring System helps do that. But the equally serious challenge is delivering a highly interactive and effective sequence of training modules built on known challenges and best practices for each flexible option. See a more comprehensive description of our [Auto-Coaching System](#) in the next issue of the *FlexBulletin*.

Collaborative or Co Scheduling is a complete, innovative vehicle that offers significant “new model” features for organizations seeking a more effective approach to flexibility. As with any new model, it comes with core features and optional elements. Co Scheduling is a customizable approach. If all or part of this system could meet your needs, we would enjoy discussing the possibilities with you.

[Bulletin #61 – NEW Co Scheduling Tools](#)

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Best regards,
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