

WHITE PAPER

Developing Flexibility and Capacity in your Workplace

How balancing flexibility and capacity for both individual and organizations changes everything

March 2020



Flexibility is a skill not a benefit

Really? It's 2020 and we are still questioning the value of integrating work and life? We can design self-driving cars, provide healthcare virtually, [automate 47% of jobs](#), but for some reason, we struggle to innovate the workplace. We are allowing archaic assumptions to dictate the rules.

Want flexibility? Sure, you can work 70-hours a week anywhere you want. Striving for better work/life balance? That's fine, just don't let it get in the way of the expanding list of tasks we've assigned to you. Care about diversity? Work as hard as I do, and we'll be happy to consider you as potential leadership material.

If this is how you think, stop reading now. This article is for everyone else - professionals who have been experimenting with how to integrate work and life and seen how it results in wins for people, their organizations, and their families. We're going to introduce you to a vibrant community of leaders who have remained steadfastly committed to creating time for life while also moving into positions of leadership. These counter-cultural Whole Life Leaders are going to show you how they transformed their careers, their lives and the people around them.

Ok, I'm curious now. Tell me more.

Innovation requires a paradigm shift. Those who have successfully found a way to balance work and life have changed the way they structure their lives by shifting a fundamental assumption. They have discarded the outdated notion that a work-first and work-only approach is essential to business and the only route to success. Then they have reframed this binary assumption into one that recognizes work matters AND life matters.

Meet Michelle. At the start of her career, Michelle and her husband both worked in public accounting. But when their daughters were born - in order to embrace both their work and family goals - they knew a few changes were required. First her husband switched jobs to one that had more standard work hours so he could be in charge of pickup from daycare. Then, when their daughters started school, they faced another hard choice with the long summer breaks looming ahead. Michelle was the daughter of two teachers, and she remembers loving

Whole Life Leaders

Whole Life Leaders succeed in their careers by supporting the team of people they work with to create an integrated approach to work and life.

These leaders also create a team at home who can share in the care of the needs of their families.

Whole Life Leaders create these teams to better manage episodic overwork - a temporary uptick in work.

They've also learned supporting everyone to follow an integrated approach helps them become wiser in avoiding chronic overwork.

Most importantly, Whole Life Leaders discover their commitment to living a full life becomes a powerful vehicle for change - challenging outdated norms at work and home.



the slower pace of summers. That's when Michelle came up with her flex-year schedule. Working an 80% schedule, Michelle changed her hours to 35 hours a week during the Fall, about 55 hours a week during the busier tax season, and then 20 hours a month during the two-month summer break.

To make this new schedule work she also had to learn how to make adjustments so that she could focus on the more strategic aspects of her work in less time (such as client management). How? Michelle became an expert in delegating key tasks to her administrative assistant. Each year she also mentored one or two associates so she could delegate some of her client focused work to them over the summers. No surprise, this built their skills as well. As Michelle got better at flexing, she also discovered the hours she billed working an 80% schedule *were not significantly different from her peers who worked full time.*

Michelle wins. Her organization wins. Her associates win. Her family wins. Michelle became a role to others, and she was also promoted to partner on this schedule.

Some definitions:

- **Balance:** this happens in the moment - something that one physically "feels" as in "*I feel out of balance*"
- **Integration:** this happens in the long run – it's how you create multi-faceted lives, with paid work happening alongside other components
- **Work First Work Cultures:** in these organizations, life needs are always subservient to work and career priorities
- **Triple Win Solutions:** flex options that are good for the individual, the work you do, and the people you work with
- **Win-Win Boundary Setting:** working together to set thoughtful limits to how much work you take on, so you can do your best *and* help your organization thrive

Isn't this just a flexible workplace? What's different?

Michelle and her husband wanted to create an integrated approach to work and family. Although this was not the norm in their work-first workplaces, they supported each other to keep striving for this solution over the course of their careers.

Work mattered to both of them. So did their lives outside of work. Both parents became experts in learning how to set thoughtful limits on how much work they could take on. We call this win-win boundary setting. They also found ways to flex in a way that allowed them to excel at work, be responsive to the needs of colleagues and clients, and keep their eyes focused on their lives, not just their careers. Truly a triple win!

To follow this integrated approach individuals and organizations need to become experts in two dimensions: flexibility and capacity management. Flexibility defines where and when someone works. Capacity management relates to how



much work is expected to be done individually, as a team and within the organization.

Flexibility requires agility, and the ability to think outside the box when faced with competing goals. Capacity management requires innovation in how the work itself gets done such as prioritization, expectation management, and strategic delegation. In fact, success in these two dimensions requires a set of 21st century skills¹ that are valuable for everyone who works in today's 24/7 business environment.

These leaders are changing the rules.

Professionals who develop these skills, who are then promoted to managers, begin to spread these skills to their teams. Solutions abound once people make integration and triple win solutions a core operating assumption. Instead of pre-defining where, when and how much work gets done, individuals, leaders and teams work together to determine what outputs are required for success. Managers get out of the business of micro-managing time and place, and into the business of managing effectiveness.

This perspective shift is just beginning to occur in organizations. When it happens, it also seems to start with the pioneering individuals – Whole Life Leaders - who have already developed skills around flexibility and capacity management. The matrix below captures this movement.

Flexibility – When/Where we work	Whole Organization Supported		Organizations support an integrated approach for all
	Whole Team Support	Teams support each other to flex & set win-win boundaries	
	Individually Accommodated	Individuals Flex & Set win-win boundaries	
		Individually Accommodated	Whole Team Supported
		Whole Team Supported	Whole Organization Supported
Capacity Management – How much we work			

Figure 1 © Third Path Institute

¹ For a full description of the 21st century skills individuals develop to become stronger leaders, see ThirdPath's Whole Life Leader booklet: www.ThirdPath.org/free-thirdpath-resources



Whole Life Leaders often begin their journey in the lower left box where they negotiate changes at the personal level. To do this takes courage, foresight, and the belief that individuals have the power to make change.

In Will's case, he started his journey in the top left box. His organization supports lots of flexibility around where and when people work, but they set very few limits around how much people work. Regardless, Will found the courage to negotiate a 4-day work week when his children were born because he and his wife jointly agreed that they both wanted to play an active role in raising their children. This joint perspective also gave him the courage to later negotiate a 3-month sabbatical so he and his family could tour the country in a Winnebago when their children were school-aged. Most recently it gave him the courage and clarity to set limits around how much work he could take on as he and his wife balanced their work with the care of their aging parents.

Although Will fits in the middle column, top box – a leader who has created a pocket of change within his organization – Whole Life Leaders populate every box in the matrix.

- Leaders in the far-left column are skilled at flexing when and where they work, but not as skilled around capacity management
- Leaders in the bottom row are experts in managing how much they work, but not as versed around helping people flex where and when they work
- Leaders in the top right box have truly created 21st century workplaces – everyone can do a triple-win flex, and everyone works together to set thoughtful limits around how much they work while supporting their organizations to thrive
- There are also many leaders like Will who have created a team or “pocket” within an organization that is more flexible than the rest of the organization

Whole Life Leaders can influence change within a box, and can influence change by moving across the matrix. Their success will depend in part on their individual skills and in part on the openness of their organization's culture - openness the leader may be able to influence, or openness because leaders leave for organizations that are more open. Movement across the matrix can simply happen by role modelling, as others see the leader's success and want to do the same. It can also happen in a very planned manner as leaders very intentionally develop the skills in their teams (e.g. cross training team members so that each person can take a full vacation without checking in).

Let's go back to Michelle. When Michelle first started to flex her work, she was in the lower left box. Over the years, Michelle developed the skills to create triple win solutions. She also learned how to better manager her own and her team's capacity for work. It also turns out these skills are very transportable. Today she works for an organization that is more receptive to these ideas, and



has moved to the middle box of the matrix. As the CFO of a bank, Michelle took all the skills she learned, and now supports her entire team to find triple win solutions. Her team is thriving. Michelle continues to find time for her own life outside of work, even as an empty-nester. She's also got the ear of the CEO, and he's paying attention.

Chris is also in the middle square of the matrix, and he has done this within a large, highly competitive international hotel chain. Chris runs a 15-person virtual sales team. This means everyone has a lot of flexibility around where and when they work, including Chris. But Chris also helps his team around capacity management. Some team members are naturals at managing their own capacity. A few are not as strong in their ability to do this. Chris works more closely with these employees. But Chris has also learned to use more skilled team members to mentor them. Chris also has team members with type A personalities, consistently over-performing. Over-performers can be a great addition to a team, but Chris knows the challenges of burnout, and how it can impede the entire team's success. So Chris mentors them as well. Chris has created a pocket of change within a work first workplace. His team also has become the highest performing sales team for three years in a row.

Ben is in the bottom, far right corner of the matrix. He started his law firm specifically under the premise that they were "going to do things differently" and consciously decided to make quality of life a cornerstone of their new firm's culture. Compared to most firms, Ben's firm has much more reasonable billable hours, so people have more time for life. Ben's also so skilled on these issues that he's the one who invented the terms chronic versus episodic overwork. (Learn more about this in the Whole Life Leaders insert on the first page.) Yes, even in Ben's supportive work environment there are times when there is too much work. But Ben also knows the dangers of chronic overwork. He likens it to a factory that is constantly working over capacity, and how this increases the chances of mistakes and machines breaking down.



Figure 2 © Third Path Institute



Not inspired enough? Meet Ken.

Ken intentionally designed work at his law firm with the principles of flexibility and capacity management. Policies support an integrated solution for all. For example, they strongly discourage people from connecting to work during vacations, staff can apply triple win solutions to rearrange when where and how much they work, and everyone has learned to create quiet time for focused thinking work during the day. A green sign on an office door means “come on in” while red means “do not disturb.” The benefits? People stay. They don’t burn out. And they continuously work together to figure out the “best” approach to work.

It’s not a coincidence that his firm figured this out. He’s followed an integrated career his entire life, including today as he helps care for his grandchild.

I’m ready to do more!

Because the solutions are tailored to the situation, your own personal goals, your skillset, the skillset of your team, and the culture of your organization, there’s no prescriptive way to implement this. But we’ve learned some key steps that may help you get started.

- 1) **Be bold.** Michelle, Will, Chris, Ben and Ken all took some calculated risks.
- 2) **Get specific.** Consider what’s a realistic first step to pilot. How is it a triple win? What’s the most important work you should focus on given the time you have available for work?
- 3) **Get support.** Find support from your partner at home, support from a group of leaders developing these approaches (can be an internal group or an external group such as leadership groups convened by ThirdPath). Use these groups to ask questions of why, what, and how, and to hold you gently accountable as you reach for your goals.
- 4) **Jump in.** You are going to learn more about how to make it work once you get started.
- 5) **Evaluate thoughtfully.** Notice if there is resistance. Explore why. Is it time to leave?
- 6) **Experiment. Learn. Repeat.** What skills do you need to learn to move diagonally across the table? What barriers or opportunities might you come across from the wider organization?
- 7) **Share.** Become a resource for others who want to live a full life. See what you could roll out across your organization.

Yeah, but it’s not going to work at my organization.

Ok, you may be wondering, I’m in the bottom left box. How can I influence wider change? Is the only answer to leave? Leaving might be the most appropriate move and like Michelle, you can take the skills you are learning to



another job. But we also know a growing group of leaders making impactful changes even in this situation.

Take Brett. Brett works for a traditional, hours-maximizing law firm. The culture doesn't readily support working a flexible schedule and it is in fact looked on disparagingly. Teams also change with each client so it's difficult to build a pocket of long term flexibility within a team. However, even in this environment, Brett has had an impact on his organization. He's created the work-life integration group, mentored younger lawyers, and brought mindfulness training to the whole firm. Being in the bottom left box hasn't stopped Brett from being a Whole Life Leader who is changing the rules of the game.

In our work with leaders, we have learned that when an individual presents the "ask" in terms that showcase the triple-win, managers are less resistant and more willing to experiment – especially at the individual accommodation level. This doesn't mean there will be support, and there might even be active resistance. But clearly laying out what is happening, checking in regularly with all those affected to understand their perspective and the impact on them, and finally adjusting as necessary, will be key to your long-term success. And look what these leaders are doing today!

Change is an iterative process. A leader is influenced by the organization, but a leader can also influence the direction of organization. Whatever the reason for changing, once leaders experience the deep satisfaction and joy from following an integrated approach - *and* they see how they and their team are more effective at work - it strengthens their motivation to continue to follow this approach, and to share it with others.



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Orange Grove Consulting specializes in research-based leadership development and bias-removal. We help organizations improve recruitment, retention and promotion of diverse talent across an organization. We can uncover barriers to diversity in current talent pipeline with a focus on removing them so all people can thrive. Our end goal is to create more innovative and productive workplaces. Learn more at www.OrangeGroveConsulting.com

Third Path Institute assists individuals, families and organizations in finding new ways to redesign work to create time for family, community and other life priorities. They see to develop a growing community of individuals, leaders and organizations to influence wider change - both within organizations and at the public policy level. They support a new mind-set where everyone can follow a "third path" - an integrated approach to work and life.
Learn more at www.thirdpath.org