Implementing Smart Working

A year in the life.........of a "wise work" project

Decide

↓

Initiate

↓

Proof of concept

↓

Launch

↓

Roll Out

↓

Consolidate

Chris Ridgewell, Peter Thomson & Tony Wareing
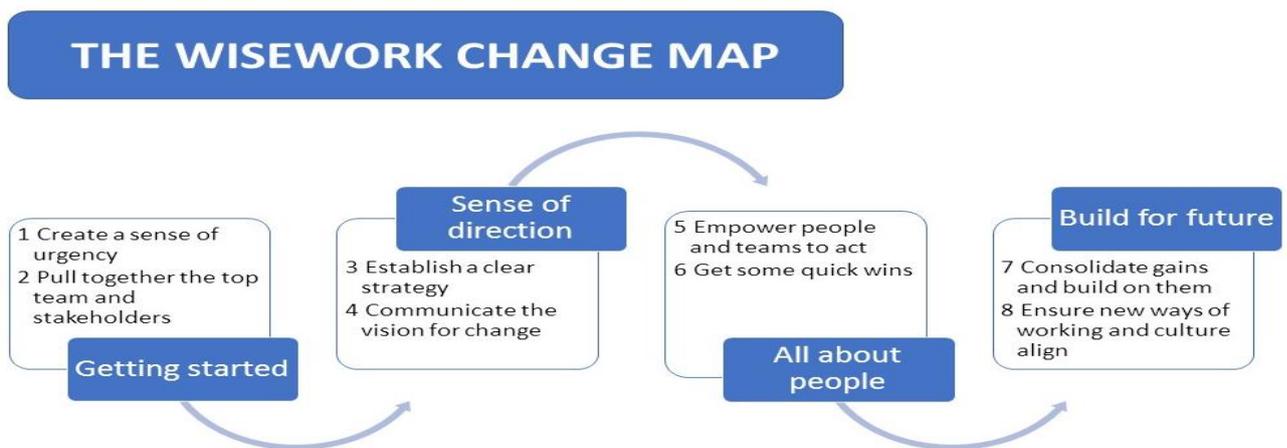WISEWORK LTD

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Foreword

A year in the life.........of a "wise work" project.

"Flexible, agile, responsive, smart, cost saving, outcomes focused……"

These are all words used to describe new working practices. Sometimes they describe the future state, sometimes they are misleading. They are often driven by necessity, against a background of budget cuts and increasing expectations.

We prefer to call our solution wise work. It's a lot more than flexible working and an extension of smart working. It's wise because it is put in place as a key business strategy, recognising that the productivity of the workforce is critical to all organisations. It's about an engaging culture that gives staff control over their working lives. It doesn't just produce happier, more loyal, employees, it produces results.

During 2016 Wisework ran a series of webinars mapping the progress of a typical project from inception through to its implementation. Following each of the six webinars a chapter was added to this e-book, written by Wisework Directors Chris Ridgewell, Peter Thomson and Tony Wareing. Our approach is based on the Wisework Change Map.

THE WISEWORK CHANGE MAP

1 Create a sense of urgency
2 Pull together the top team and stakeholders

Getting started

Sense of direction
3 Establish a clear strategy
4 Communicate the vision for change

5 Empower people and teams to act
6 Get some quick wins

All about people

Build for future
7 Consolidate gains and build on them
8 Ensure new ways of working and culture align

After John Kotter, Leading Change, 1995

1 - deciding to start the project

This chapter focuses on making the initial decision as to whether it is worth pursuing the introduction of more flexible ways of working for your organisation. It is about taking the opportunity to:

- Audit your current practices and attitudes

- Clarify the business case using a balanced scorecard

- Explore your readiness to take further steps and make a compelling case to go forward

New ways of working

There are many definitions of more flexible and smarter ways of working. Whatever the

definition the aim is to develop more effective workplaces that benefit the individual, the organisation and their clients and customers. Work with our clients suggest a handful of key features that appear time and time again. You will almost certainly recognise these as potentially beneficial attributes. The challenge is to find ways of implementing new working arrangements so they really provide the benefits you are seeking. This means taking critical stakeholders with you, educating other people about advantages and risks and understanding the case for going forward from a business perspective.

Taking an integrated approach

It's all too easy to see the challenge from your own perspective. For example:

- HR who want to improve the workplace for employees, providing satisfying work and attracting and retaining the best employees
- Facilities specialists who want to get the best benefit from existing and future workplaces against a background of high real estate costs
- IT staff and other technologists who can see solutions to improve workplace effectiveness and efficiency

But the evidence suggests that driving the project from any one of these perspectives is less likely to succeed than an integrated approach where all of these stakeholders are influenced and involved.
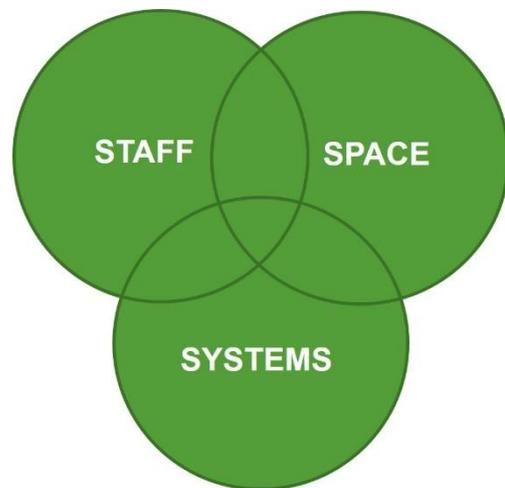
Flexible working – a definition

Flexible working covers a wide range of working patterns that are not the usual full-time, fixed location, fixed hours arrangement. It usually refers to a variation in the time or place of work, even if the new pattern is not 'flexible' on a day-to-day basis. It is related to:
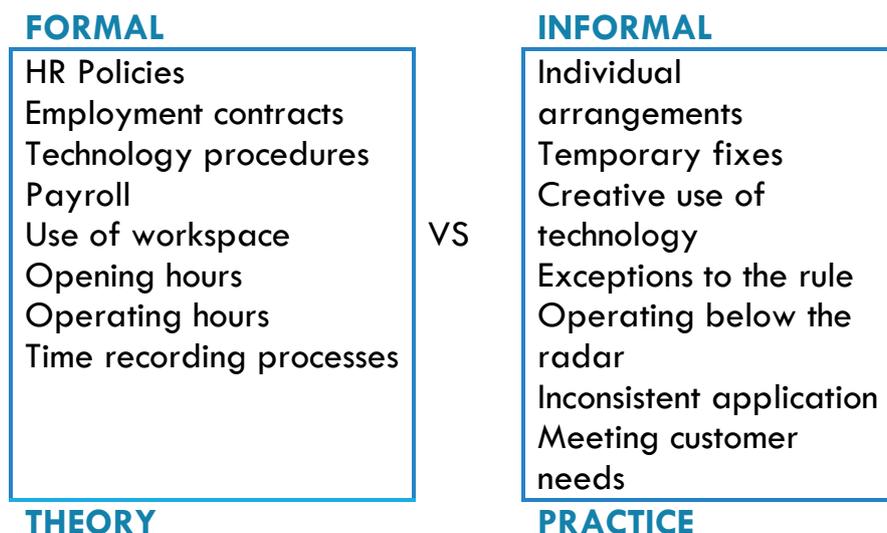
- *How much is worked,* which could be part-time, job sharing, etc

- *When work is undertaken,* perhaps outside the 'normal' working day or varied during the year such as term time working

- *Where people work,* such as at suppliers' or customers' sites, whilst travelling, at and from home

Flexible working usually requires:

- A framework for communications and team meetings that is effective and robust

- A working environment that facilitates and supports non-territoriality, collaborative working and considerate behaviour

- A management culture based on the measurement of performance which is both fair, reasonable and promotes personal responsibility and trust.

Auditing current practice

Whatever formal stance the organisation takes towards more flexible ways of working there are likely to be informal practices going on in various places. It is worth reviewing both the formal and the informal. Some examples are shown below:

FORMAL		INFORMAL
HR Policies Employment contracts Technology procedures Payroll Use of workspace Opening hours Operating hours Time recording processes	VS	Individual arrangements Temporary fixes Creative use of technology Exceptions to the rule Operating below the radar Inconsistent application Meeting customer needs
THEORY		**PRACTICE**

It is a fact of organisational life that the formal arrangements are often seen as the theory and the informal as real practice. So often the formal arrangements are also seen as the barriers to progress and the informal as providing the real opportunities. We think it is worth spending some time evaluating the formal and informal arrangements in terms of barriers and opportunities. To what extent are they helping to get you to where you want to be and to what extent are they hindering? Of course, really understanding the informal arrangements will be

difficult and will require the goodwill and cooperation of others – an early step in influencing stakeholders and gaining support for possible changes.

Benchmarking for flexible working

In order to know the potential for flexible working it is useful to gather data on the current situation and establish the potential for change. This can be done through questionnaires, focus groups and interviews with existing employees and managers.

The results of these data gathering exercises can then be used as the basis for a change programme to introduce flexible working in the most effective way. The data also indicates the major benefits that people expect from flexible working and the likely problem areas.

Benchmarking can be used to compare with other organisations and learn from their experience.

Is working flexibly appropriate for your organisation? - a questionnaire

We have developed a questionnaire to help understand current readiness for more flexible ways of working. Users of this ebook are free to use it within their own, and client, organisations provided it carries the endorsement:

"This questionnaire is the copyright of Wisework Ltd www.wisework.co.uk and is used with their permission"

This assessment questionnaire has been designed to help you think through whether working flexibly will suit the working environment of your organisation. The questionnaire will also help you to review how your organisation can be more effective when working flexibly.

The questionnaire covers the organisational development, cultural and management issues that impact the effectiveness of flexible working. There are

other important issues such as the type of work, the ITC and support systems which are not dealt with in this questionnaire.

There are no right answers. Please take time to think about how your organisation works and what is required from the working environment. Be as honest as you can be as this questionnaire is designed to help you think about how flexible working can be effective in your workplace.

Before you start, decide whether you are answering these questions from the perspective of the whole organisation, the department, your team.

You will find the questionnaire here as well as notes to interpret what it means. The results should then be fed into your planning process and influence the business case.

The business case

Ensuring that you can build an effective business case is perhaps the most important step in the deciding process. If you are unsure about this, you are unlikely to be able to persuade others. Some pointers include:

- Review the competition – learn from other's experiences – some questions to ask
    - What is it they are doing to become employers of choice?
    - What behaviours do they encourage?
    - What benefits are they seeing?
    - What are the issues and barriers to making progress?
- Establish the potential for change
    - Use formal approaches like questionnaires, focus groups and interviews
    - But don't ignore informal information including what people observe to be happening
    - How risk tolerant or risk averse is the organisation (this may vary in different parts?

- Set realistic expectations from the change in terms of
  - Cost or efficiency benefits
  - Employee benefits
  - Behaviours and attitudes
  - Leadership behaviour
- Set clear goals and measures using a balanced scorecard approach

CUSTOMER, COMMUNITY	FINANCE, FUNDING, FUTURE
PEOPLE, ORGANISATION	INTERNAL PROCESSES, EFFICIENCY, QUALITY

  - Reflects the viewpoint of different stakeholders
  - Ensures a focus on a balanced range of benefits and measure
  - Provides a strong basis for setting baselines and future evaluation
  - Is in business-like language
- Making the initial go/no go decision
  - This is an early opportunity to decide whether the project is worth pursuing further
  - Have you got sufficient information to persuade others?
  - Can you clearly identify
    - Advantages of going forward?
    - Any risks?

Using the balanced scorecard – an organisation-wide approach

The scorecard below identifies examples of potential outcomes from working more flexibly. It is not intended to provide an exhaustive list, but rather to stimulate thinking about what is important in your organisation. You may wish to change the headings for each of the quadrants to make it more appropriate

CUSTOMER, COMMUNITY	FINANCE, FUNDING, FUTURE
Extended opening hours	Better control of travel
Mobile work to support customer	Sustainable solutions
Enhanced place in community	Meet environmental agenda – reduced pollution
Improved customer survey results	Decreased payment arrears
Fewer customer complaints	Increased revenue
Better meet diversity needs	One off efficiency gains
	Lower operating costs
	High return on investment
PEOPLE, ORGANISATION	**INTERNAL PROCESSES, EFFICIENCY, QUALITY**
Sickness absence down	Reduced work in progress
Employee retention improved	Flexible worker productivity higher, supported by mobile technology
Higher employee satisfaction	Improved accuracy in activity based workplace
Improved attractiveness as an employer	Faster turnaround
Employer of choice	Improved floor-space utilisation
Improved work-life balance	
Lower stress	
Meet needs of multiple generations	

WISEWORK
Transformation through flexibility

Your organisation – measures, goals, baseline, future

Think about where you work. Put some examples into each quadrant and begin the process of building a comprehensive and structured understanding that will lead to the creation of a compelling case for taking the next steps.

| CUSTOMER, COMMUNITY	FINANCE, FUNDING, FUTURE
PEOPLE, ORGANISATION	INTERNAL PROCESSES, EFFICIENCY, QUALITY

Making a compelling case

- Document the thinking behind the proposal
- Write a short report demonstrating the business case
- Identify resources needed to support the project
- Evaluate the barriers to getting approval
- Build list of benefits
- Find successful examples
- Be realistic about the risks
- Produce **outline** project plan

2 - initiating

The previous chapter was about making the decision in principle to move towards new ways of working. Getting to this point probably hasn't been without its difficulties, involving as it has:

- Auditing current practice

- Understanding in some depth the strength of the business case

- And using a balanced scorecard approach to provide a common framework for creating a compelling case

This chapter is concerned with the initiating step with its focus on 3 key areas of influence.
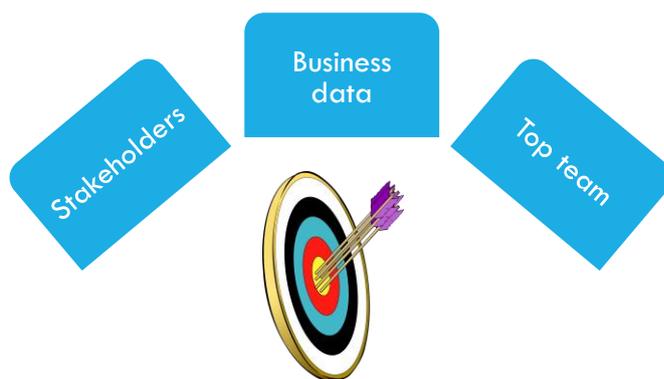
Identifying and influencing the main stakeholders. These are the people who can ensure the success or otherwise of the project. Without effective support progress is unlikely.

Using business data to best effect to support the business case. There are some stakeholders who will be influenced by general arguments about the benefits of working in more modern ways. There are many others who will only be persuaded by a powerful business case backed up by numbers.

Getting and keeping the top team on board. The journey is a strategic one and requires the active leadership and participation of the top team.

Stakeholders

By definition, stakeholders are powerful and efforts to understand them and the extent to which they are for or against your project will be amply repaid. This is not simply about identifying your friends and those who are easy to work with. It is an opportunity to get as many powerful people as possible lined up behind you and your project. One useful tool is a stakeholder influence map. The approach is very simple yet effective.

HIGH INFLUENCE

AGAINST ———————————— **FOR**
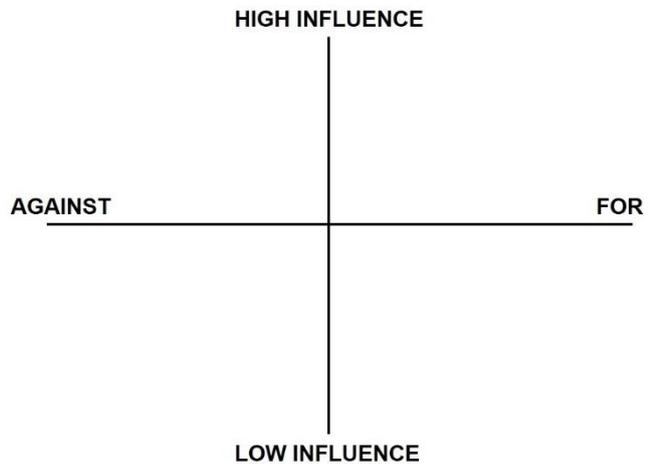
LOW INFLUENCE

The two axes to the map are influence and the extent to which individual stakeholders are for or against you or your project. The starting point is to brainstorm a list of stakeholder and plot them on the map. Whilst this can be done alone it is probably better to do it with existing supporters or members of your project team to help mitigate any personal bias. You may well end up with dozens of people populating the map.

When you think about influence it is worth remembering that the level of influence may not be related to level in the organisation. Trade union leaders often have large degrees of influence as do informal leaders in the organisation. So, include people who may have influence over key players.

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Once the map is populated it is time to start thinking about strategies to increase the influence of your project. Looking at some examples:

Jane has high influence and is for you or your project. It would easy to conclude that putting your efforts into your supporters like Jane would be sufficient to ensure success. But to ensure progress a wider range of support will almost certainly need to be built.
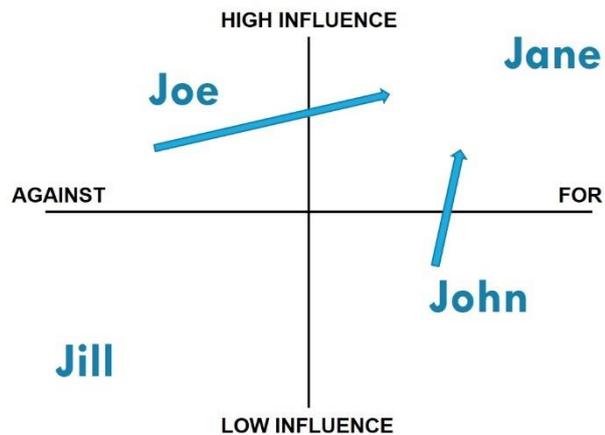
Jill is against you or your project but is seen to have low influence. In general it is probably not worth investing much effort in persuading people in the against and low influence quadrant. But it is worth developing strategies to move people from the quadrants occupied John and Joe towards or into the top right hand quadrant.

Taking Joe for example. What can you do to:

1. increase influence further?
2. persuade him that your case is worth supporting?

How can you enhance John's influence?

So, the aim in mapping is to move stakeholders towards the top right quadrant, increasing your support base and improving the chances of project success.

Stakeholders – organising the project team

It would be very comfortable to have a project team with huge levels of support and very high influence across the organisation. However, given the realities of organisations some thought will need to be given to agreeing some ground rules for the team. In effective project teams, leaders have:

- Established goals with real added value

- Built goals with clarity of purpose and direction

- Built goals that are shared and supported

- Established measures of success

- Organised around business needs not organisational boundaries

Business data

It is time to review the business data collected to support the decision to make

- Review the competition
  - Learn from others' experiences
- Establish the potential for change
  - Questionnaires, Focus Groups, Interviews
- Set realistic expectations from the change
  - What will it do and not do?
- Set clear goals and measures
  - Using a balanced score card
- Making the go/no go decision
 - Is there sufficient support/resource?

progress. Use the checklist on the left to structure the review. In particular, we recommend using the balanced score card to ensure that data is collected for all four quadrants and not just the one where you have the most familiarity.

Working with the top team

We say it all the time, but building the involvement and support of the top team really is a critical step. Here we introduce two approaches that work extremely well, either as stand-alone interventions or as part of a longer workshop session.

Using a maturity model

The first concerns how far the organisation wishes to move in its journey to more flexible ways of working. Participants are asked to mark on a scale of 1 to 10 where the organisation is at present and where they want it to be.
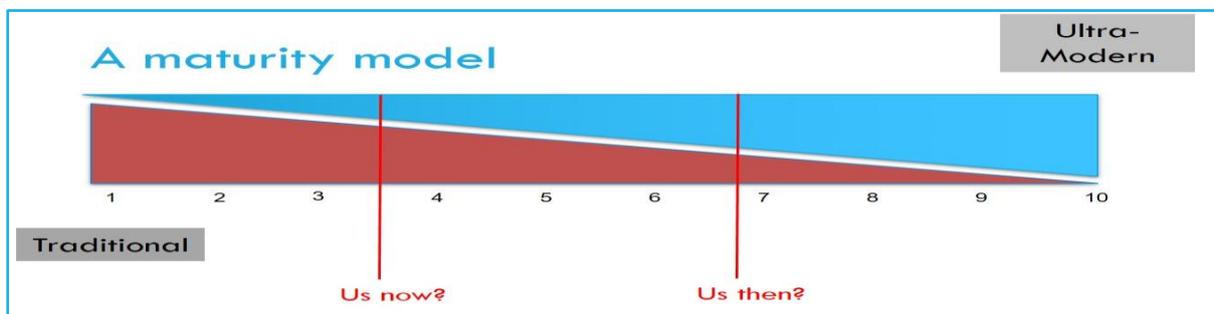
1 is defined as totally traditional, where people come to work at the same time each day, work a standard day at a fixed place of work.

10 is the ultimate in flexibility, where individuals decide where and when they work, laptops and other mobile technologies are the norm.

It is fairly typical for top leaders' views about where they are now and where they want to be to differ from each other quite widely, perhaps by 3 or 4 points on the 10 point scale. In this activity significant pieces of work are completed in an engaging and practical way:

- Differences between leaders are explored and sometimes resolved
- Identification of difficulties becomes explicit and plans made to deal with them
- Enthusiasts emerge leading to the selection of pilot areas in which to test out ideas

- The scale of the planned journey is defined setting a base for next steps planning

Building a road map

The second approach which again works well with top teams is to involve them in the process of building the major project steps. This has two advantages:

- Having been involved they are more likely to drive and reinforce the project over time
- The complexity and importance of the project is reinforced

This is a situation where the older technologies possibly work best. All that is required is:

- A long wall
- A roll of wallpaper
- Post it notes
- Pens
- And the will and enthusiasm to get involved.

A part of a result might look like this:

3 - proof of concept

Piloting wise working practices

How do you move from the draft project plan to a situation where you can test the theory and see which new working practices best suit your situation, the needs of the business and your people?

The first step – the project plan

The draft project plan must now be completed and agreed by everyone concerned including all the stakeholders you have previously identified. You must make sure that everyone can access the project plan. This is simple to do if it is in the form of an Excel spreadsheet for example but may not be so easy if the plan is embedded in a specialist software system that only a few people know how to use.

The project plan must identify who is required to undertake which specific action(s) together with target completion dates. It may be necessary to identify the resources required for specific tasks, as well as any perceived risks or problem areas. Those tasks that are critical to completion need to be highlighted in the form of a "Critical Path".

Remember that the unexpected often happens, so build in some flexibility and make allowance for contingencies. At various points in the plan it is necessary to build in progress checks, especially if reports have to be submitted at various times to senior management. These checks should make comparisons to the agreed baseline measures and expected outcomes. Critically the project plan must also include the communications that are to be used.

Example work plan headings

GOAL	KEY ACTION AREAS	TIMELINE	EXPECTED OUTCOME(S)	DATA SOURCE(S) & EVALUATION	PERSON OR AREA RESPONSIBLE	COMMENTS

Setting the base line measures

Accurate data on the current position in the project enables you to measure progress, quantify problem areas and delays and if necessary, re-calculate completion times. However, you must first be absolutely clear as to what you mean by success and the required outcomes. It is also vital that everyone involved shares the same definitions and objectives.

Having meaningful base line measures that are relevant to the project, the organisation and the management team is vital. In our client' work we have seen these base line measures used – although the list in the box is by no means exhaustive.

- Desk occupancy
- Meeting and training room usage
- Car park usage
- Sickness and absenteeism rates
- Staff retention rates
- Staff morale and employee engagement
- Rates for recruitment of new staff – especially those having specialist skills and/or experience
- Efficiency, productivity and performance
- Time spent with customers and clients
- Time required to perform and complete specific tasks
- Travel costs – including the cost of people's commuting
- Travel times – including commuting

Your measures for success can be used to test whether the base line measures have in fact been achieved or exceeded.

Communication is vital

Communication with everyone involved in the project is vital and is a key activity strand running throughout the plan. A carefully managed communication programme informs people in the organisation, (and possibly your customers and suppliers too), about:

- Why the project is being undertaken and for how long
- Who is involved at this stage – and who is not
- What will be required of them, and when

- What to expect to be happening, and when

The communication programme is an effective way to manage people's expectations, especially for those not immediately involved but who might want to be. You might need to explain that once the pilots have been completed and evaluated, then new styles of working will be introduced into the organisation, perhaps on a rolling basis wherever they are appropriate.

The communication programme can also be used to seek people's opinions, views, advice and tips perhaps using questionnaires and suggestion schemes. It is an effective means of securing both employee and line management engagement in the overall project.

Virtual and physical communication

- Newsletters
- Staff magazines
- E-mail
- In-house social media
- Message boards and bulletin boards
- Noticeboards
- Large screen displays
- Lunchtime information sessions
- Leaflets
- Skype
- Webinars

External case studies

Using relevant external case studies helps to inform the project plan. They can be used to show you what has worked in the past in similar circumstances, and what did not work, (and why). It is useful to consider what is happening in your own business sector as well as in others. Most organisations experience the same core needs irrespective of the sector that they are in.

Look at how other organisations measured success. What working practices, procedures and technologies were found to be most relevant or useful for

specific job types, occupations, teams and departments? Are any of these relevant to your own situation, requirements or objectives?

There is a wide range of sources of external case studies including:

- Professional bodies such as BIFM (facilities management), the CIPD (HRM), the Chartered Institute of Management, the British Computer Society

- Social media contacts including Linkedin and the various Linkedin groups

- Your management consultant's own client reference sites

- The ONS (Office of National Statistics)

- The TUC and individual trades unions, especially in Local Government

- Work Wise UK

- Trade associations

Running the wise working pilot(s)

Where time permits running one or more internal pilot programmes enables you to try out and test various different working styles before they are formally introduced into the organisation. We often find that clients run pilots in a number of different areas of their organisation, often testing the new working practices for specific job types and teams. These pilots run for a defined period of time usually with a mid-term evaluation designed to assess progress, identify problems and blockages and determine overall progress.

Some clients deliberately establish at least one formally managed pilot in areas where more flexible working styles are already practised – even if these are ad hoc or informal at the present time. The people involved in these "current bonfires" may well become your future project champions. They will usually want to make things work and often come up with innovative solutions and ideas regarding more agile and flexible forms of working.

Evaluating the pilot(s) against the original project plan

Where something is found not to be working quite as expected, a half-term evaluation enables you to re-assess what is needed and make any necessary changes before starting the final phase of the pilot(s). It may be necessary at this stage to report to and gain senior management approval to continue and complete the pilot(s).

At the end of the Pilot period, the outcomes should be measured against the base line measures and your criteria for success. Feedback should be gained from everyone involved in the pilot(s) – not just the Pilot group itself but also from everyone who supported the programme as suppliers of services, technology, otherwise known as your stakeholders. To do this you can use a variety of methods ….. questionnaires, 1-to-1 interviews, 1-to-many workshops, online surveys and polls and group discussions.

You many now need to secure senior management approval for a formal roll-out of wise working practices to other areas or perhaps even to the entire organisation.

The results of the pilots can be recorded in writing, as videos or as podcasts and used as internal case study material. It is often useful to write up both the success stories AND any instances where things did not quite work out as planned. The latter can then serve as a learning tool so that the same mistakes are not repeated. The write-ups should be integrated into the communication programme so that other areas of the organisation can see what might best suit their own situations.

Running pilot(s) of new alternative working practices has proved to be an effective way of securing engagement and support from both employees and line managers, as well as with senior management in organisations. Those involved in the pilot(s) later become "champions" for the cause and often serve as wise working Ambassadors helping to promote the concepts and work with

other areas of the organisation to ease the introduction of new working practices into other departments, buildings, and even subsidiaries.

4 - implementing

Launch

Now that the pilots have been run and evaluated, it is time to launch your wise work scheme. We need to learn from the pilots and understand what can be measured from them. It's worth listing the things that went well and not so well, and identify the pitfalls that could get in the way of the roll-out.

Where to start

A fundamental choice is where to start the launch of the scheme. Do you choose somewhere where it is easy to make it work, or do you choose one of the more difficult ones? Our experience is that it is better to choose an operational, 'front line' department to show that this is not just a scheme for the 'staff' people in head office. Then, when it is seen to be successful in this environment, doubting managers will be more willing to listen and have an open mind.

It helps to choose a department for the launch where the manager is known to support flexible working. Then he/she can act an ambassador for the scheme and convince the doubters in other departments. We have used managers of the launch departments (and the pilots) to make presentations as part of the management training. It is always much more convincing to have an experienced and respected manager talk enthusiastically about wise working, than have an outside consultant do so.

It's important to have the right support resources in place before the launch. Managers and staff in the launch department(s) should already have been trained. The real estate, office layout plan needs to integrate with the people plans. The technology needs to be in place to support mobile working. If there is a building move involved it will be critical to the timing of the move to wise working.

Balancing staff, space and systems

Here is where we come to the 'Three Ss': Staff, Space and Systems. We use 'staff' to cover all employees including temporary and part-time as well as contractors or self-employed people. 'Space' refers to the employer's premises and any other place someone might work. So, this includes shared offices, temporary space, homes, coffee bars, hotel rooms and working on the move. 'Systems' is broader than just the Information Technology to support the scheme. It covers any systems that influence the way people work; paperwork processes, routine procedures, and any policies that govern how work gets done.
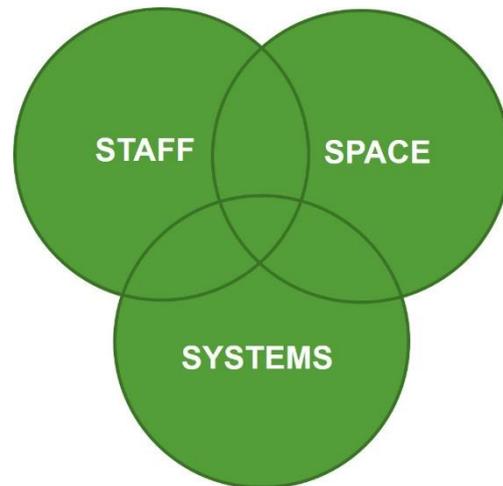
Staff

Looking at these in more detail let's start with Staff. The launch programme must have senior management support. Perhaps the Chief Executive could produce a video to give the message right from the top. It is critical to reinforce the message that this is a business initiative not just a roll-out of some new HR benefits scheme. This should then continue down the layers of management so senior managers are seen to be setting the example not just talking about this.

Team charter

To do this we have used a team charter process where managers have an open discussion with their teams about how they can work effectively and still give the maximum flexibility to people who would like to work a different pattern of time of location. This can be facilitated by someone from outside the team, perhaps someone from HR or maybe an outside consultant. This has the advantage that a level of consistency can be maintained across teams without having to resort to tight sets of rules.

Ambassadors

It's always useful to have one person in a team who is responsible for supporting the others. Sometimes this is referred to as an 'Ambassador'. In some organisations we have run a formal Ambassador scheme with extra training so these local 'experts' are in a position to provide help. This might be on the use of technology, or other practical advice on getting work done in a mobile way. This person can also help people adjust to managing their own time and not having to stick to a strict work regime.

Communication

As well as communicating through teams and ambassadors it is advisable to have a communication programme covering all staff, even those who are not immediately affected. This can be done using existing channels such as newsletters, forums and the intranet. But it is worth considering the use of leaflets with helpful hints on how to adapt to the new way of working. For example, people moving to a 'hot-desk' from a conventional workstation will need to understand guidelines such as a clear desk regime to allow others to share the same space. If there is a move to new office space involved then it is likely that there will be a 'welcome to the new building' information pack.

Training

It is also worth considering a training session for people to prepare them for the new way of working. Typically this might be a half day covering the practicalities of working in the new way and the psychological issues as well. A good wise work scheme will involve a shift of responsibility from manager to employee; empowerment in action! People need to recognise that the new freedom comes with responsibility for managing their own work and still collaborating with their colleagues. Training can prepare them, and their managers, for this.

HR policies

The final point in the 'Staff' topic is to be sure the relevant HR policies are updated to reflect the new working environment. If people are likely to be working from home they need to be aware of the implications for Health and Safety, Insurance, Planning, Rates etc. Working on the move may also need some guidelines covering issues such as security. Contracts of employment may well need to be amended, particularly for people who will be changing their main place of work.

Space

The location of work is a key factor in new ways of working. 'Space' can be chosen to suit the task at hand rather than be static. So the 'activity based workspace' will include a selection of environments, some suitable for formal meetings, some for informal ones, some for quiet solo work and some in a more communal setting. During the

> **Space, some key points**
> - Numbers of people likely to work from home
> - Provision of home office furniture and services
> - Allocation of desks versus hot desking
> - Meeting space, formal and informal
> - Space/desk booking systems
> - Activity based workspaces
> - Flexibility to match changing demands

launch phase, people will be getting used to the new flexible space and take time to settle into new patterns of usage.

The topic of 'space' is broader than the buildings owned by an employer. Some people may choose to work at home for part of their time. They may have suitable space where they can separate themselves from the rest of the family, neighbours or other distractions. For others, home may be totally unsuitable for doing their jobs and they have to come to a separate workplace. Even then, it doesn't always have to be the employer's building. It could be a shared office, a work hub or even a coffee shop. It is important at the 'launch' stage to allow

people to experiment with difference work spaces and find out what works for them.

Systems

Systems, some key points
• Ability to access information from outside the building
• Technology to match mobile work patterns
• Scheduling replacement of existing systems
• Supporting virtual meetings
• Use of social media to substitute for remote working
• Systems to match individual choice

'Systems' are needed to be prepared for the launch of your wise work scheme. Technology that supports mobile working is a key part of this so people can remotely access the same information as they can in the office. Many existing technologies will already be able to support new working patterns, so there is no need to start again from scratch. However, issues such as data security may need to be tackled to reflect the new environment. Outside of IT there will be other paperwork systems and procedures that were designed on the assumption that everyone works in the same place. These may well need to be reviewed.

5 - roll-out

The roll out phase

The Roll Out Phase aims to implement the best practices learnt during the Pilot Phase and builds on the previous Launch Phase of the programme.

A phased approach?

You first have to decide whether to adopt a phased approach – rolling out wise work into one area first, then the next, and so on; or instead implement the new working styles across the entire organisation at the same time.

Whichever approach you adopt, planning remains vital to the success of the programme. The overall top-level plan will have been updated as you have progressed through each of the previous phases. This process continues. Within the plan there will be a series of sub-plans covering in detail, each of the activities required. These activities again need to be clearly defined, and agreed by all the stakeholders, with precise deadlines stated as well as the resources required.

Whilst there are economies of scale that can be achieved by introducing the same solutions to a larger number of people and areas of the business, there will also be times when a more bespoke, tailored option will be necessary. Examples include equipment and services designed to accommodate people with a range of disabilities and work capabilities, as well as areas of work requiring more specialist support and more job-specific IT and telecoms services.

Training and education

The new wise working styles will require a range of training and familiarisation activities to ensure that everyone is comfortable with the changed working patterns and options. This should lead to people working as efficiently and productively as possible, within the shortest space of time.

Wherever possible this training should be dovetailed into your existing training regime including, for example:

- Leadership styles
- use of technologies
- time keeping
- health and safety at work
- data and information security and management, etc.

A wide range of training methods are available that include:

- **Workshops for line managers and supervisory staff** designed to inform on the best ways of managing and leading teams of people whom they may not now see from day-to-day, or who might now be working at times when the managers are away.

- **Workshops for whole teams** (including the team leaders) can be useful for teams to identify and agree the best working practices relevant to their own team requirements.

- **Master classes** run by existing and experienced wise workers. Especially useful where teams and staff are based in the same building or are in the same, sometimes dispersed, department.

- Online, internal (and external) **webinars.** These are useful for exposing people to case study examples showing them what has worked best – and what doesn't work - in given situations.

- **Pre-arranged visits to other wise working sites** in the organisation, or in other organisations and businesses. Useful sometimes in gaining hands-on experience.

- IT, equipment and other specialist training courses.

- **HR-led sessions** outlining the new wise working terms and conditions of employment, expenses and car business mileage procedures, back-office support available, etc.

- **Property and facilities management-led sessions** outlining the facilities now available in buildings, how to book meeting spaces, touch-down desk space, etc. This is also useful in giving advice on how best to set up a 'Home-based Office' and perhaps advice on 'Working While On The Move'.

- **Ambassador training** focusing especially on communications and coaching skills.

One idea that has been used by a client involved issuing all staff with a pocket-sized **'passport'** detailing all the training and other sessions that they were required to complete in order to move onto the wise working programme. As they completed each entry, the passport was duly signed by the trainers or Ambassadors.

Wise work Ambassadors also have a role to play in the support. training and familiarisation of new wise workers.

Ambassadors

Ambassadors are staff who have already moved onto the wise working programme and already have experience of the new working patterns as well as more detailed knowledge of the facilities and support available. Their role is to help staff transition to the new working patterns, or perhaps into a new building set up for the programme.

They serve as role models and exemplars of best practice and they play a key role in educating new staff. Some may also serve as trainers and they can assist the induction of newly-joining staff into the programme. In essence the Ambassadors become 'a friend when needed'. They are highly visible, readily accessible and enthusiastic about the programme and are a key source of knowledge. Some of their work may simply involve informal chats with staff over a cup of coffee.

In some clients, the Ambassadors are also there to assist and guide staff moving into newly designed, or refurbished buildings and work areas which now act as

bases for their teams. In these circumstances, some may, for a time, wear brightly coloured tabards helping people to identify them.

In some circumstances the Ambassadors may also serve as mentors, for example to support team leaders and supervisors, helping them to adjust to the new working styles and methods of leadership and management.

Note that it will be necessary to make suitable arrangements for the normal day-to-day work of the Ambassadors to be covered whilst they are away 'on duty'. It may also be necessary to introduce some form of recognition or reward for the Ambassadors – who may already be very busy people.

Communications

As mentioned before, communications is a vital component of the implementation phase and this activity never stops. It comprises both formally managed and delivered messages as well as informal methods disseminated for example by word of mouth amongst groups of people during team briefings and meetings.

The communications programme must be structured so as to make sure that staff are made aware of the wise working initiative, how they join it, what is expected of them and what the organisation is doing to help and support them. Messages include how and where to access advice and information, and who the Ambassadors are in their area. Case studies should be made available, both of successful implementations and some which did not go according to plan so that the lessons learnt can be readily assimilated.

Effective communications methods at this time include;

- Regular news and updates contained in staff newsletters, online blogs and bulletin boards, inhouse social media, video carousel displays in corridors, posters on notice boards
- Information leaflets
- Materials left on tables in staff restaurants and around coffee machines

- Lunchtime talks given by members of the Senior Management Team … who may also attend team meetings and leave messages on the internal online Websites
- Quality communication from the top
- Promotional wise working events
- Feedback mechanisms to enable staff to voice their opinions, advice and thoughts regarding the programme

Guides and toolkits

As well as the various policies and procedures you will also need to develop and make available a range of wise working manuals which contain the core set of rules, guidelines, hints and tips, etc. These are complemented by a range of toolkits which might include any of the following …

- Change management and changing business processes
- Developing team working in the new work environment
- Leadership skills required for the new working styles
- How to organise and run meetings under wise working conditions, both for traditional face-to-face and remote meetings
- Part-time (and other forms of time-independent) working
- Toolkits designed for use in specific buildings
- The Ambassador toolkit, perhaps including guidelines for coaching and guiding other staff
- Starter packs for wise workers
- Toolkits for people who work while 'on the move'
- A home working pack.

The home working pack might include hints and tips as well as guidelines concerning:

- Setting up a home office including appropriate furniture, IT, telecoms services, lighting and heating, etc

- Health and Safety in the home office, perhaps including a self-fulfilment questionnaire or check list

- Guidelines regarding information and data security;

- Handling visitors to the home office

- Advice regarding insurance

- Advice regarding possible covenants and other restrictions that might limit the ability to work at home

- Policies and procedures regarding claiming business-related expenses, staying in contact with the rest of the team and the team leader, etc

- Induction of staff joining the wise working programme and of new staff joining the organisation

As time goes by new staff members will join the organisation and the wise working programme. They will need to undergo the same induction and be offered the same training as existing wise workers in order to gain the same benefits.

Induction must be formally managed. The wise working Ambassadors can play a key role in helping your new starters to adapt to the programme acting as their guides and coaches, providing initial support and helping with familiarisation.

Monitoring and updating

Change is a constant in any organisation. You must ensure that the wise working programme continues to meet the needs of both the organisation and your people.

Key staff must be tasked with the responsibility for monitoring the programme and holding regular reviews. These people should report to senior management on a regular basis and give feedback regarding any changes that might be needed to the programme. In this way, you can make sure that the working practices remain relevant to the organisation and the nature of the work being conducted.

Policies, procedures and guidelines need regular review, especially where external factors such as legislation and industry trends have an influence. Toolkits also need to be kept up to date.

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6 - consolidation and the future

In his book, Leading Change, John Kotter describes an eight-step process for effective change. We have developed this model to create the Wisework Change Map. Previous chapters have focused on the first 6 steps, in this one we focus on steps 7 & 8 – Build for the future.

THE WISEWORK CHANGE MAP

Getting started
1 Create a sense of urgency
2 Pull together the top team and stakeholders

Sense of direction
3 Establish a clear strategy
4 Communicate the vision for change

All about people
5 Empower people and teams to act
6 Get some quick wins

Build for future
7 Consolidate gains and build on them
8 Ensure new ways of working and culture align
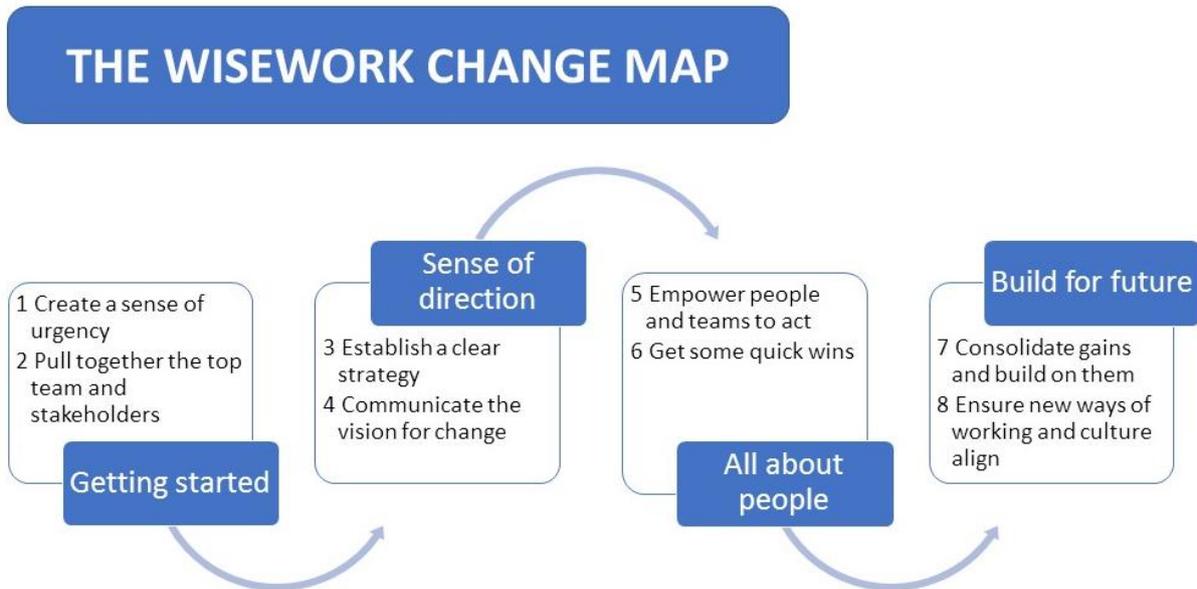
After John Kotter, Leading Change, 1995

New ways of working and culture

In the book, Future Work, written with co-author Alison Maitland, Peter Thomson shows how there is a mismatch between how most managers would describe the ideal organisation and what is actually happening. Tackling the culture is clearly a critical component in moving to new, smarter and more agile ways of working.

Maitland and Thomson developed a 25 item questionnaire focusing on the four areas of organisational values, management style, management processes and decision-making. The culture for future work is measurable and we have developed the Future Work Profile as a visual way to help senior managers focus on the which aspects of the culture they wish to change. In the example

shown below some of the biggest gaps have been circled in red as a stimulus to decide what actions to take against each of the 25 items.

Sample Future Work Profile

Gap between actual and desired culture
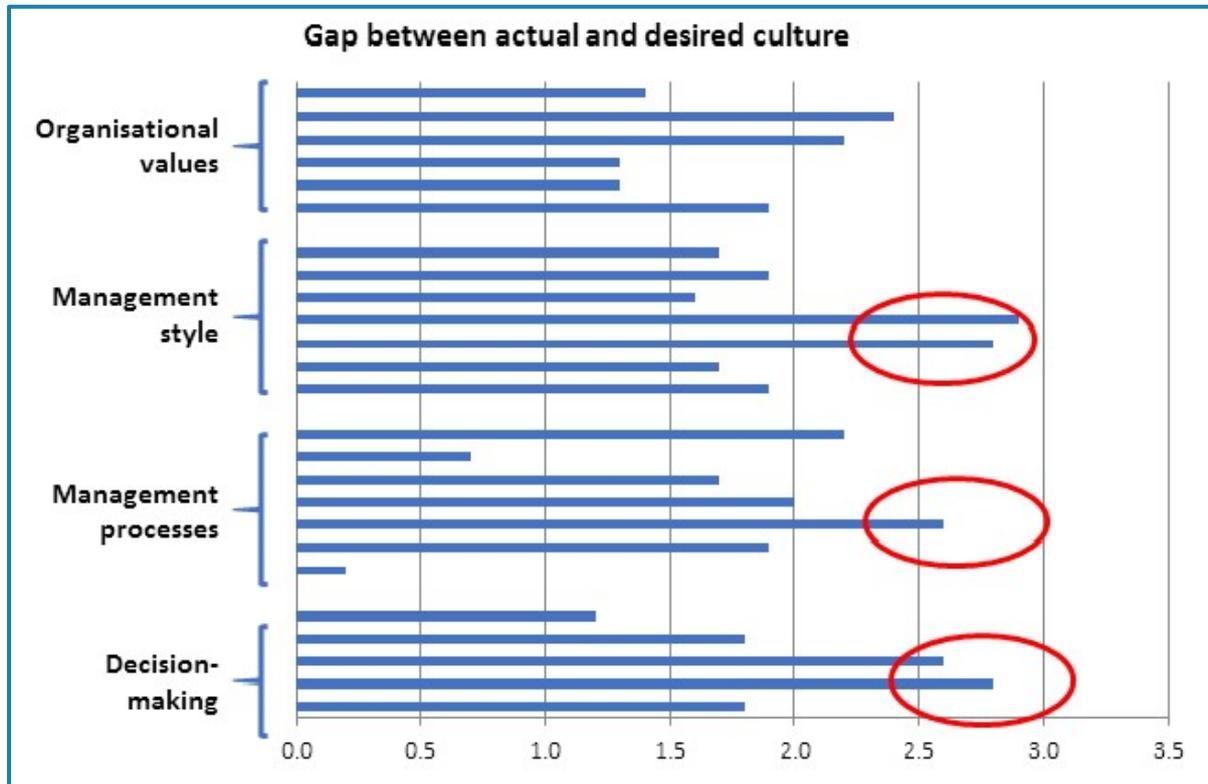
Getting the most out of teams

Almost inevitably, it is teams that provide the momentum to make the changes happen. Give the team the chance to decide how best to organise themselves to get things done and the results can be astonishing. Teams can be energised and developed around new ways of working and provide the success stories to help persuade others to change.

Team Charter toolkit

Our Team Charter tool was developed to help teams develop their own plans to succeed in the new world of work. This includes Team Charter templates and step by step guidance for facilitators, often line managers or ambassadors, to lead the activity.

Team Charter Toolkit – Step by Step How to Guide

1. Why?
- Explain why you are facilitating this activity

2. Charter Step - 1
- Explain column headings and content
- Show and discuss sample Charter

3. Charter Step - 2
- Discuss each theme and get group to decide on priority to work on this item. How important is it to them?

4. Charter Step - 3
- Ask team to work through some areas of importance to them, identifying agreed new ways of working
- Record these in the last column

5. Charter Step - 4
- After meeting transfer agreed actions to the Team Charter template
- Collect outstanding items that require more work or future review in the right hand column

6. Charter Step - 5
- Guide team to identify and resolve any barriers to their Charter
- Seek agreement of leader and team to act on their decisions
- When will they review?

Alignment

If organisational practices are not aligned with the vision and culture espoused by the top team then a drift back to the status quo is inevitable.

It is important to change highly visible practices that get in the way of successful change. So often it is simple practices in areas such as handling expenses where the process is not congruent with desired new culture. For example, saying we trust people on the one hand, and subjecting them to excessive checking on the other is unlikely to aid progress.

We recommend that stakeholders are involved in completing a simple grid to audit how well the desired attributes for the organisation are supported by policies and practices.

DESIRED ATTRIBUTES	HR Policies	Finance procedures	Management Development	Organisation structure	etc
Leadership style			✓	x	
Flexibility		x			
Trust		x			
Involvement	✓				
Empowerment					
etc					

This can provide rapid recognition that whilst some policies and practices are supporting the moves to a new culture and new ways of working, others are not. It is a fact that people will quickly spot those areas where actions and the desired attributes do not align. Therefore, it is critical to act on them.

Leadership

It is said in every change programme but effective leadership really is critical to success. The behaviour of leaders throughout the organisation will be one of the biggest factors in achieving the desired results and there is no doubt they will be seen as role models for both their helpful and unhelpful behaviours.
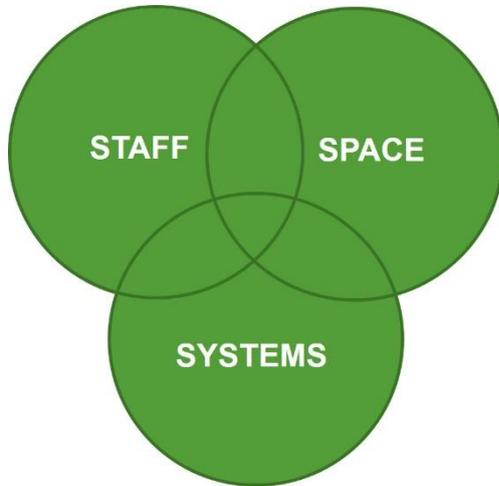
Top leaders also have the main role to play in identifying, recruiting and developing future leaders who have the skills to lead in a much more flexible world.

Wherever possible in our projects we have involved leaders from the beginning in planning the project. The active involvement ensures that a common language can be built, that senior team members can commit their functions to specific actions as part of the plan and that a realistic approach to political issues can be taken.

This is often achieved in a planning workshop for the top team, building on information from the Future Work Profile, described earlier, and constructing a shared road map that builds clarity about the goals and the route to get there. (See p16Working with the top team)

Lessons learned

While it is possible to approach your wise working programme from any one of the three "S" bases or business drivers it is still essential that the other two elements are taken fully into account in the design, planning and implementation stages.

Only if attention to Staff, Space and Systems are kept in balance will the new working practices become embedded into the organisation and become sustainable.

Three cautionary tales

Three short cases follow, where failure to keep the 3 S's in reasonable balance led to unwanted consequences, which could easily have been avoided.

1 In the first example the HR Department of a large Government Agency, as part of a programme to become "*Employer of Choice*", introduced a broad range of agile working options for staff but without making any attempt *to* identify possible stakeholders.

Consequently, the IT Department found that it was required to supply many laptops and smartphones but did not have sufficient annual budget left to cover this.

Facilities Management was suddenly instructed to make considerable alterations to offices in to accommodate team-based areas during an already busy period.

2 Next, as part of a property rationalisation programme, _a client's Facilities Management Department_ introduced team-based areas into its sales offices with fewer desks than there were team members. It was assumed that staff would desk-share. No pre-launch consultation or awareness sessions were held with the teams.

Most sales teams came into the offices on the same days resulting in several people having to share workstations.

Sales staff then began working at/from home and kept client records there rather than in the offices. As a result the company did not have full sales records and this infringed the requirements of information security and the Data Protection Act.

3 Finally, _the MD of a networking and IT support services company_, formed a small team of internal IT staff and told them to implement a "_New Workstyles_" programme across the business - based on a mixture of working "on-the-move", home working and the use of third-party local managed office space at a work hub.

The IT Team bought large amounts of laptops, smartphones, remote systems management software and moved to a new mobile and broadband provider.

They did not ask for help or guidance from HR, Facilities Management, Finance or their legal and risk advisors. Nor did they give any thought to how or when staff actually worked or what they really needed to perform their duties.

Staff were suddenly issued with new IT and found that in many cases, their desks had been removed. The result was almost immediate chaos.

Staff were now unsure of where they were supposed to be working and many found that they could not use the new technologies efficiently as no introductory or training was given.

We have identified four key lessons from the cautionary tales (there may well be more).

1. Ensure stakeholder involvement
2. Build a broad communication programme
3. Balance investment across 3 S's
4. Recognise technology as an enabler, rather than a driver, of change

Which, in a way takes us back to the beginning of this ebook and the need to take a carefully planned and integrated approach to what is a major change project for your organisation. Good luck!

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