

WORK-LIFE BALANCE DOING IT RIGHT AND AVOIDING THE PITFALLS Jim Bird

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The demand for work-life-balance solutions by employees and managers is expanding at an unprecedented rate. As a result, work-life balance is an increasingly hot topic in boardrooms and government halls today. Over the coming decade it will be one of the most important issues that executives and human resource professionals will be expected to manage.

This article provides the methods for you to accelerate the implementation of a very successful work-life strategy within your organization. First we cover why work-life is critical to the key objectives of your organization and its executive team. A brief history of work-life efforts follows so you can learn from the trial and error of others and avoid their mistakes. Finally, we describe the two parts of a successful work-life strategy and how you can most quickly and effectively implement them.

Let's start with the senior executive concerns and opportunities that work-life affects.

- **Growth and profit impact.** Accelerated on and off-the-job stresses and expectations are adversely affecting top and bottom-line growth, unnecessarily driving down productivity. A well-implemented work-life strategy greatly reduces both the real and perceived overwork and out-of-balance pressures that hamper productivity, producing a dramatic positive return on investment.
- **Full Engagement and customer service.** A workforce that is out of balance, unnecessarily stressed, or disgruntled greatly reduces full engagement with external and internal customers. Conversely, commitment to the organization's objectives and clients' needs rises in direct proportion to the perception that the organization is committed to both the work *and* life success of each individual.
- **Competitive advantage for talent.** Demanding baby boomers--and even more, the smaller pool of younger workers--have increased their expectations of a positive work-life culture. Employees expect their employers to recognize that in addition to having a job, they have a life. This is reflected by the fact that work-life balance issues with the boss or the company are the number-one reason that individuals quit their jobs.
- **Health-care cost solution.** The rising organizational cost of health care is driving senior management to become more proactive about employee health. Senior managers view engaging employees in improving their own lifestyle behaviors and creating a healthier workplace as key components to the solution.

Because of the business and personal links between these critical issues, executives now recognize that organizational objectives and individual work-life objectives are not "either/or" choices. It is not "Do we get the most out of our people? Or do they have lives?" Instead it is,

“The way we get the most out of our people is by encouraging each of them to have a life.” It is the job of the senior management team and specifically HR to make this happen in ways that are consistent with the organization’s business and customer-service objectives. Unfortunately, even as the demand for work-life solutions has skyrocketed, many work-life efforts have fallen short of their promise and potential to deliver the desired results for the individual and the organization. Positive new trends in the field, however, show that results can live up to expectations. In planning your own work-life efforts, be careful to avoid the pitfalls others have stumbled into and focus on implementing the successes. Let’s start with learning from the past.

A BRIEF HISTORY–TRIAL AND ERROR

During the 1960s and 1970s, employers considered work-life mainly an issue for working mothers who struggled with the demands of their jobs and raising children. Throughout this period and into the mid-1980s, the U. S. government had the major impact in the field, as reflected by the Presidential Conference on Families, the Pregnancy Discrimination Act, and the Quality of Employment Survey.

During the 1980s, recognizing the value and needs of their women contributors, pioneering organizations such as Merck, Deloitte & Touche, and IBM began to change their internal workplace policies, procedures, and benefits. The changes included maternity leave, employee assistance programs (EAPs), flextime, home-based work, and child-care referral. During the 1980s men also began voicing work-life concerns. By the end of the decade, work-life balance was seen as more than just a women’s issue, affecting men, families, organizations and cultures.

The 1990s solidified the recognition of work-life balance as a vital issue for everyone--women, men, parents and non-parents, singles, and couples. This growing awareness of the central importance of the issue resulted in major growth in attempted work-life solutions during this decade. Numerous studies showed that the generations from baby boomers to new college graduates were making job choices based on their own work-life issues and employers’ cultures.

Unfortunately, although companies were adopting family-friendly policies, employees and managers were not implementing them. Many of the policies put into place in the 1980s failed to have a significant impact on most managers’ and employees’ real-world work-life-balance results. Americans still reported feeling even more overworked and out of touch with their non-work lives much of the time.

During the first years of the twenty-first century, the disappointing results made human resource and work-life professionals as well as executives at all levels take stock. Karol Rose, author of the soon to be published book *Work Life Strategies*, comments on these trends in *Fortune Magazine*’s third annual work-life special feature included in the October 2005 issue. She noted that the Work-Life Leadership Council of the Conference Board, a gathering of high-level corporate HR and work-life professionals, drew these conclusions on looking back over the last decade of efforts. Among their concerns were:

- Work-life business cases have not achieved their intended effect.

- Stress, overwork, and their negative impact on productivity and health-care costs are real and growing.
- Competition for talent from all levels and ages will increase

Some of the solutions proposed by The Work-Life Council included:

- Draw from different organizations and departments representing different perspectives to identify key work-life issues, the next “big thing,” and future best practices.
- Identify the new trends--which might not be visible now--and develop strategic responses.
- Create a new language for the work-life field.
- Maximize the beneficiaries of work-life efforts.

What is the next “big thing” or new trend that will produce successful results for individuals and the organization? How do you implement it with support from across the organization? How do you avoid past mistakes? How do you create a new language that maximizes value for the most beneficiaries? You start by recognizing the two key components necessary for any successful work-life strategy.

THE TWO LEGS OF THE WORK-LIFE STRATEGY

Until recently, most organizations have taken a one-sided “systems” approach to their work-life efforts. Their focus has been on adopting organization policies, benefits, and procedures to solve the work-life-balance problem. Although helpful, the systems approach overlooks a critical fact: At its core, work-life balance is more an individual issue that affects the organization than it is an organizational issue that affects the individual.

The systems approach asks, “What can the organization do to create a better work-life balance for the individual?” The other half of the work-life strategy, the “individual” approach, asks, “What can individual employees and managers do for themselves to create their own best work-life balance?”

In the work-life strategy ladder at [Work-Life Strategy Ladder](#), the rungs of the ladder represent your organization’s reasons for addressing work-life balance in the first place. You want to climb the ladder, starting out with the recruiting rung. Once new employees are recruited you want positive retention, higher productivity, attitude/morale, great customer service, and ongoing employee commitment, all of which will generate higher revenue and record Profits for businesses or exceptional levels of service for governmental and nonprofit organizations?

The Left Leg of Your Work-Life Strategy--Implementation Opportunities

The systems approach is the left leg of the ladder. If your organization is like most, you have already built a fairly solid left leg. You have health insurance, vacation time, various benefits, and possibly EAP or education programs or flexible work policies. It is important to reinforce what you have, but it may also be valuable to implement some creative, potentially quick-hit opportunities that have proven to have a high impact in certain organizations.

Keep in mind that anything you recommend and implement must be consistent with the business objectives of your organization. Here are ten options for the systems leg of your strategy.

1. Reinforce through better communications what you are already doing. Most companies' work-life benefits, procedures, and policies are isolated from each other. Pull them together and publicize them as your work-life package. At a minimum, post them on your Web site as a package.
2. Abolish internal Friday-afternoon meetings. With full support from management, this policy alone can bring very quick and positive results.
3. Give a half day off on Fridays if the individual has put in the incremental hours earlier in the week and assuming that no outside customer meetings are scheduled.
4. Endorse working from home one day per week.
5. Offer subsidies for off-site exercise.
6. Create and support athletic teams. Consider underwriting part of the expense.
7. Provide one or two days off with pay for approved community involvement.
8. Create and encourage an annual or quarterly "bring your family to work" day.
9. Establish a "disconnect from work" vacation policy--no cell phones or laptops.
10. Create a more accommodating "on- and off-ramp" policy for those who leave the firm, especially if it is to spend time with family. When they show interest in coming back, make it easy for them to get back on where they left.

Some of these items can be quick-hit opportunities to reinforce the left leg, systems side of your work-life strategy. But it is critically important for you to remember that....

A One-Legged Ladder Won't Stand Up

Even with the most comprehensive programs, the systems approach will not stand by itself. With only one leg, your work-life ladder will fall. You won't be able to climb up to the retention, morale, and revenue rungs you were targeting.

As we mentioned earlier, the right leg is, "What has the individual done for him or herself to create their own best work-life balance?" The lack of a supporting right-leg strategy is why most organizations have failed to achieve the work-like results they desire.

The Right Leg of Your Work-Life Ladder--Individual Differences

The right leg is essential because the best work-life balance is different for everyone. The best work-life balance for you is different from that for your coworker, or your boss or your neighbor. For some, working long hours creates value and balance in their lives. For others, it is not a routine they can productively or enjoyably maintain.

In addition, the best work-life balance changes for each individual over time. A good work-life balance for someone starting his or her career is different from that for someone getting ready to retire. A good work-life balance for someone who is single with no children is different from that for a single parent with two children. Your own best work-life balance will

change, often on a daily basis. As a result, your company or organization cannot create the best work-life balance for you. As individuals, we must find and create it for ourselves.

Brad Harrington, the director of Boston College's Center for Work & Family, has reflected on past efforts. He says, "Work-life balance comes down, not to an organizational strategy, but to an individual strategy. Often organizational 'programs' cost a great deal of money and miss the mark for the individual, or at least most of the individuals. We have built in-house child-care centers that require a large investment in bricks, mortar, and staffing. They create a lot of visibility. But at the end of the day, what about the 9 out of 10 individuals who don't have kids between 1 to 5?"

Harrington is not saying that these left-leg programs do not bring value. Instead he reflects that what we need now is "something that takes it down to the individual level--more help to the individual to help them sort it out for themselves." As a result, for most organizations the key work-life strategy question becomes, "What can we do to support that right leg of individual responsibility, accountability, and action that touches everybody? How do we make sure all managers and individual contributors have the skills and a common language to positively sort it out for themselves?"

The Future of the Individual Approach

The solutions to these questions have begun to materialize. Over a decade of research by the Ford Foundation, WorkLifeBalance.com, and others shows exciting results from advancing a "dual agenda" of improving organizational effectiveness *and* enabling managers and individual contributors to integrate work and personal life more fully and positively.

Research has shown that the relational skills needed for better interactions with family and friends and the skills called for in increasingly team-oriented work environments are very similar. Developed, on-the-job skills in dealing more effectively with internal and external customers are transferable to off-the-job relationships *and vice versa*. Similarly, time-, project-, and activities-management skills learned on the job are transferable to accomplishing family, personal and community objectives as well.

Put another way, developing great off-the-job skills can result in great on-the-job skills. This is true both for leaders and individual contributors. Managers and supervisors who develop skills that work for them as individuals are better equipped to respect the importance of their employees' work-life choices and to advise their employees on those choices.

The dual agenda of better organizational effectiveness and better personal work-life balance is made possible by the win-win process of dual-purpose work and life learning.

THE "NEXT BIG THING": DUAL-PURPOSE WORK AND LIFE TRAINING

Dual-purpose learning is education that applies both to learners' on-the-job lives *and* to their off-the-job lives. It has proven to be the quickest way to accomplish the organization's most critical work objectives and the individual's work-life balance objectives simultaneously.

We can view dual-purpose learning both as employee development and as a benefit. It is an issue for everyone in the organization, from executives to new hires. It is used in recruiting and for driving productivity. Because of this multifaceted HR and productivity training impact, senior executives at every level have initiated enterprise-wide work-life programs. Implementation of work-life balance training has been steered by vice presidents of HR and HR generalists, chief learning officers and trainers, work-life professionals, and benefits specialists.

Human resource managers who implement successful work-life training programs throughout their management ranks accomplish two major bottom-line goals. First, they increase the retention, commitment, and productivity of the firm's most valuable people asset, its managers and supervisors. Second, the managers and supervisors reflect a new tool set and language that produce a much more positive view of the organization at all levels. This more positive view has a cascading impact on the attitude, morale, productivity, and customer-service levels of all employees.

For example, Monsanto conducted a set of baseline surveys on customer satisfaction within their finance department. The conclusion was that employees' satisfaction with their work-life balance was one of the two strongest predictors of customer satisfaction. The other factor was employees' general satisfaction with their jobs. With this demonstrated link between employees' assessment of balance and customers' ratings of overall quality of service, Monsanto initiated a global-finance dual-learning program. Over the next three years, results exceeded expectations in almost every area in which performance measures had been identified, including customer service quality ratings, problem resolution, timeliness of information, and employee work-life balance ratings.

In studies with dozens of corporate and government clients, WorkLifeBalance.com has established that dual-purpose learning (work and personal applications taught together) nearly doubles the retention and utilization rates of specific relationship, time management, and project-management skills learned as measured 60 to 120 days following the learning.

The resulting impact on productivity is also clear. In a study of over 5,000 participants using the dual-learning approach, 94 percent of learners reported ongoing on-the-job productivity gains from the learning, with an average reported individual productivity increase of 24 percent.

For the individual and organization to get the full benefit of developing these dual-purpose work and life skills, you need to make the learning of such skills a part of your organization's stated strategy. Just as we train managers and employees in technical skills necessary to succeed in their jobs, we need to make a commitment to training in work-life skill sets that reinforce the individual's success on and off the job. Important specifics to include in these work and life skill sets are relationship, time management, focusing, and project-management tools as well as practical work and life goal creation and attainment.

Once you make the strategy commitment, implementation can be relatively easy. The HR professional can take the role of change-agent champion who secures commitment to the strategy. Or the HR professional can coordinate the implementation or actually deliver the training. You can also bring a solution recommendation to the attention of senior executives or work-life teams who request work-life answers.

How to Implement Dual-Purpose Training

Here are steps you can take to implement dual-purpose work-life training successfully into your organization. You do not need to implement all of the steps to produce a successful program, but being aware of them can be helpful as you continue your program over time.

- 1. Search out and evaluate the training alternatives.** They include:
 - a. Internal development and delivery of a work-life training program. Do you have the knowledgeable internal resources and time?
 - b. Outsource the training to a proven vendor. Excellent, cost-effective options exist. Be sure to check references carefully and that the firm specializes and has proven success in the field.
 - c. Trainer certification: external content, internal delivery. Certify your internal trainers to deliver and coordinate a proven external work-life educational program. Partnering with a proven provider for certification saves developmental time and costs and helps insure a quality outcome.
- 2. Make sure the training you plan is “dual purpose” and practical.** The skills that your program teaches must affect job performance *and* off-the job value and balance. This point is critical. The right leg of your strategy is not just awareness training. It is practical, how- to training that works both on and off the job. A discussion of theories or concepts will not successfully accomplish the objective. The learning should focus on practical tools that produce immediate results during the training, both personal and professional.
- 3. Find a co-champion to support your efforts.** It may be a senior executive. Sometimes there is more pain and thus more demand in pockets such as finance, IT or sales. If so, partner with that department’s manager in running a pilot.
- 4. Run a dual-purpose training pilot.** Select attendees from different areas of the company or deliver to your champion’s group. Address their needs and build a success story that makes the business and budget case for a larger rollout.
- 5. Secure senior management’s full buy-in and support.** Expose senior management to the training early and get their endorsement and support. Real support means they will participate in one of the early training sessions, encourage the use of the tools, and lend their signatures to e-mails and notices promoting it.
- 6. Select and train the trainer(s) to do the rollout.** Within your firm, HR professionals, trainers, members of the work-life team, and interested line managers and executives can all be good choices for trainer certification.
- 7. Start your training rollout with managers.** Bosses are the number-one reason people quit, and the top complaints about bosses are work-life issues. As a result, whenever possible, train all your people managers first. Improving supervisors’ and managers’ skill sets has the widest and fastest impact.

- 8. Cascade to employees** in a time frame that works for your trainers and budget resources. By delivering the same skill set to employees that you delivered to managers, you create a common tool set and work-life language to get things done more effectively on the job and create more individual value and balance off the job.
- 9. Put out a monthly work-life newsletter.** As part of your ongoing educational program, a monthly newsletter demonstrates more than a one-time commitment to work-life balance within your organization. You can have the newsletter developed and written internally or created and branded by an outside work-life firm. If the newsletter is done internally, each month interview an individual within your organization who is respected for his or her productivity and also reflects a positive balance. Ask him or her for tips.
- 10. Use multiple delivery venues.** Doing so creates and reinforces the common language. Most important, it drives an ongoing positive perception about your organization's commitment to work-life balance. Work-life firms have existing packages to support your efforts. You can run multiple delivery venues internally or externally with very limited administrative time or costs. Delivery venues include:
 - a. Live delivery
 - b. On-demand Web training
 - c. Access to Web training for family members
 - d. Monthly newsletter
 - e. E-mail prompts

Work-Life education replaces separate work- training and life-benefit efforts with one approach that delivers key elements of both. The result is that both the work training and the life benefit are implemented more effectively and for a fraction of the costs, greatly expanding the impact of training and benefits budgets.

Work-life training is the right leg--the individual side of your work-life strategy ladder. It puts the responsibility and skill set in the hands of each individual to create his or her own best work-life balance.

GETTING STARTED--GETTING SOMETHING DONE

There is a big difference between doing things and getting something done. Most work-life efforts by HR and work-life balance teams fail despite lots of doing. The problem is that all the doing didn't get anything done.

If you want to get something done that produces strong positive results and feedback, start by taking action now. To ensure success, make sure you have in place both the left-leg systems approach and the right-leg individual training approach. Start by addressing your organizations' weaker leg. If that is the left leg of the ladder--your systems approach--pick one or two items from the list of ten left-leg opportunities that you think you can get implemented. Then act quickly to get buy-in and implementation. If you are lacking work-life training, especially for supervisors, then you should focus on the right leg of the ladder, the individual approach.

Focus on conducting a training pilot program as soon as possible. Get through step one above, searching and evaluating the training options purposefully but *quickly*. Then with focused speed, you should move to step 4, a pilot. If your pilot is successful, you are on your way. If it misses the mark somewhat, you have learned something to make the next session right. You will find this direct, get-it-started approach much timelier and more cost effective than unending meetings, analysis, and discussions.

Whether you are just introducing a work-life program or making an already great one better, you will be substantially improving your organization's bottom line results *and* changing individuals' lives for the better. This is some of the most important work you can do. You and your whole organization will be proud of the results.

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